

# **IWEB APPLICATION USER GUIDE**



**Scientific Technologies  
Corporation**





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# 1 IWEB APPLICATION INTRODUCTION

The **IWEB** application is a software application that runs on your Internet Explorer browser for the **State Immunization Information System (SIIS)**. It provides patient immunization resource management and administration tools that work together to help perform patient immunization management tasks.

Depending on the access authorization, the following can be performed:

- Search for patients in the central registry (also referred to as the state registry database, or the central database)
- Create/Edit patient demographics (first name, last name, address, city, state, etc.)
- Create/Edit vaccination records (current and historical)
- Create/Edit names of physicians and vaccinators
- Create/Edit vaccine inventory information (lot numbers, manufacturers, etc.)
- Create/run reports
- Submit queries and reports for reminder/recall appointments
- Send imports to the central registry (upload external data to the central registry; i.e., billing systems, vital records, Medicaid, etc.)



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## 2 ABOUT THIS GUIDE

The **IWEB End User's Guide** was prepared for you to use as a reference book. It includes step-by-step instructions with illustrations that show you "how" to use the **core** application.

What is the **core IWEB** application? It includes the following menu options:

- Home (Login/Logout/Select IRMS/Select Application)
- Patient
- Vaccinations
- Facilities
- Physicians/Vaccinators
- Lot Numbers
- CASA Export
- Reminder Recall
- Imports (Send uploads to the central registry)
- Reports (Patient Record, Reports Module, and State Reports)
- Help

**Note:** Other options or modules that may be used with IWEB are considered to be separate modules because they can run as a "stand-alone." If you use a different option and don't see it in the above list or within this guide, it will have its own User's Guide. For example: Management Reports.

For new users of the application, User Task Maps (with menu options) have been included to assist you in the following:

- Initial Setup Tasks that "must" be Performed



- 
- Frequently-Used Tasks
  - Other Available Tasks

## DOCUMENTATION STANDARDS AND CONVENTIONS

The documentation standards and conventions used are:

- Menu names, options, and commands are printed in bold type and capitalized. For example: Point and click the **FILE** menu, and then select **SAVE**.
- Actions to perform are printed in bold using upper and lower case. For example: Perform a **Case Search**.
- Dialog boxes and application windows are enclosed in quotes and first letter capitalized. For example: The "Physician/Vaccinator Maintenance ADD" window appears.
- Important notes are indicated with the word note and printed in bold italics. For example:

***Note:*** If you do not see ACCESS GRANTED, you will need to re-enter an accurate USERNAME and PASSWORD in order to continue.

- Field names and descriptions are isolated in consistent formatted tables.
- Alternating footers containing document name, version number, and document number (comprised of document name, type of document, version, and release date).
- Alternating headers contain Scientific Technologies Corporation and Immunization graphics.
- Text that is typed by an end-user appears in Courier font, so you can easily read it in the document. For example:

Lincoln Medical Center

- Every document includes a Table of Contents, an illustration of every application window, with an explanation of the window's purpose, and steps to maneuver the window.



- Every application guide includes tips on using the application, such as entering data into fields, keyboard and editing keys, and application characteristics (such as drop-down menus, radio buttons, checkboxes, etc.).

## **PRINTING THIS GUIDE**

This guide uses a double-sided layout; hence, when printing the guide, send the printout to a duplex printer.



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### 3 ACCESS AUTHORIZATION & PRIVILEGES

There are six levels of user access set up at the registry level using the PCI 2000 Administrator's Web User Maintenance option.

Depending on your user access, you will either have **Client** or **View**(ing) privileges. The major difference is:

**Client – READ** (view) and **WRITE** (add new and modify) information.

**View – READ** (display) information only – no changes may be made.

There are seven types of users:

- Facility Client
- Facility View
- IRMS Client
- IRMS View
- Registry Client
- Registry View
- Vendor View

The level of access for each type of user is shown in the table. This table is inclusive of all SIIS Registry Modules.



Table 3-1: Access Authorization &amp; Permissions

	Facility Client	Facility View	Health Promotions Client	IRMS Client	IRMS View	Mass Immunizations	Paper Data Entry	Provider Recruiter	Registry Client <sup>1</sup>	Registry View	School Nurse <sup>2</sup>	School Nurse Coordinator <sup>3</sup>	Vendor View
Iweb Core	X	X		X	X				X	X			X
Block Adverse Reaction	X	X		X	X			X	X	X	X	X	
Block Contraindication	X	X		X	X				X	X	X	X	
CDC Comm Access									X		X	X	
DTT Export Source Option	X			X					X		X	X	
DTT Import Access	X			X	X				X	X			X
DTT Profile Creator	X			X					X		X	X	X
Delete Patient Access									X				
Facility Administration				X				X	X		X	X	
First Responder Access	X	X		X	X				X	X			
HEDIS Assessment	X			X					X		X	X	
Health Promotions Administrator									X		X	X	
Lead Management Access	X	X		X	X				X	X	X	X	
Lead View Access	X	X		X	X				X	X	X	X	
Lot Number Manager access	X			X		X			X		X	X	
Management Reports	X	X		X	X			X	X	X	X	X	
Map Designer Access	X	X		X	X				X	X	X	X	
Physician Administration	X			X				X	X		X	X	
Provider Recruitment Administrator								X	X		X	X	



## Access Authorization & Privileges

	Facility Client	Facility View	Health Promotions Client	IRMS Client	IRMS View	Mass Immunizations	Paper Data Entry	Provider Recruiter	Registry Client <sup>1</sup>	Registry View	School Nurse <sup>2</sup>	School Nurse Coordinator <sup>3</sup>	Vendor View
Registry Settings									X		X	X	
Remote Clinic Export	X			X					X		X	X	
Risk Assessment Access	X	X		X	X		X	X	X	X	X	X	
Security Access	X	X		X	X				X	X	X	X	
Suppress Demographic Address Check	X			X				X	X		X	X	
System Administration	X			X				X	X		X	X	
Terminate Session									X		X	X	
UFM Access	X	X		X	X			X	X	X	X	X	
Upload HL7 Access	X			X									
VACMAN Export	X	X		X					X				
Wait List Access	X	X	X	X	X	X	X	X	X	X	X	X	X

<sup>1</sup> For User-ID Creation

<sup>2</sup> Select Schools for their county only

<sup>3</sup> Select Schools for no county or multiple Counties



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## 4 MAIN MENU: LOGGING IN & OUT

If your state is using Single Sign-On (SSO), please refer to **Appendix B** for instructions on how to request your SSO Username and Password, as well as how to sign onto SSO.

The **Main Menu** offers the following options:

- Home
- Login
- Logout
- Select Application
- Select IRMS

Once you click the LOGIN option and the "STC Web Login" window appears, you can request access (username and password) to the application or request a new password.

**Note:** There are some settings that should be enabled before logging into the application. This reminder appears on the "Web Login" window.

1. **ENABLE** your browser to **ACCEPT COOKIES**.
2. **ENABLE** your browser for **SCRIPTING**.
3. **DISABLE** your browser for **POP-UP BLOCKER**.

Refer to **Appendix C** for instructions.

### LOGGING IN TO THE APPLICATION

The process of logging into the application is done in two steps:

- Starting the Browser.
- Logging into the application.



- When a Username and Password are created, it is assumed this information is to be kept confidential.

If you are an **IRMS CLIENT** user, a facility selection can be used to limit your lot number selection when administering shots and will appear when you log in.

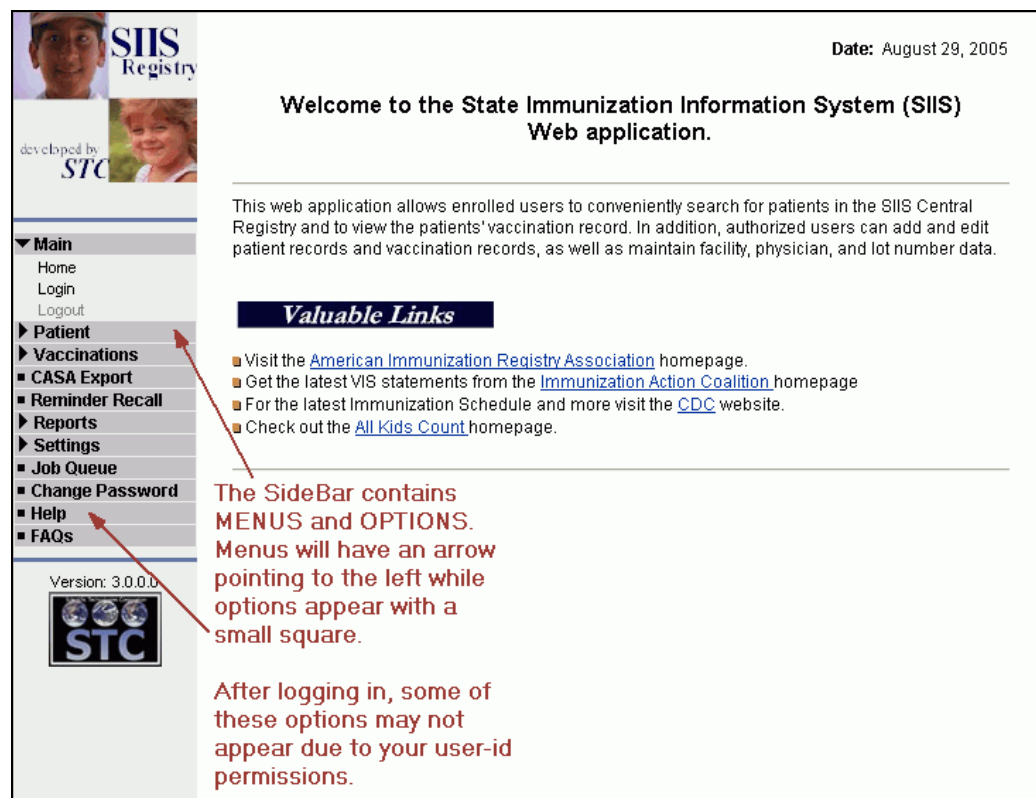
1. Open **Internet Explorer (IE)** and enter the web address for your state's immunization web site. For example,

`http://www.immunizationregistries.com`

The "Welcome to the State Immunization Information System (SIIS)" window appears.

**Note:** This window is also referred to as the "Home" window. It appears when the **HOME** option is clicked.

Figure 4-1: Home - Welcome Window



2. Locate the **MAIN** menu on the left side of the window's SideBar and point and click on the **LOGIN** option. One of two windows



may appear depending on whether you are using SSO or not, or whether you have been granted application access.

- If you have not been granted access and need to request application access, the "Request Access for an Application" window appears. Refer to Appendix B for instructions.
- If you have been granted access, the "**Web Login**" window appears with the mouse pointer positioned in the username field.

Figure 4-2: SIIS – Web Login

- If configured for your state, there are two hyperlinks that may appear below the "Password" field. The hyperlinks are used to **REQUEST ACCESS** to obtain a username/password, and **FORGOT PASSWORD** to send an email to request your password. Refer to their respective sections in this chapter for more instructions.

3. The fields and their descriptions are listed in the table:

Figure 4-3: STC Web Login Fields

FIELD	DESCRIPTION
USERNAME	This is your login id that allows you to access the application.
PASSWORD	This is your confidential password that is associated with the Username and allows you to access the application.



4. Type your **USERNAME**, press the **TAB** key, and then type your **PASSWORD**.
5. Press one of the available buttons:
  - **CLEAR** – to erase text from the fields.
  - **ENTER** (or click the **LOGIN** button) – to process the information. Depending on your User Permissions, one of three windows will appear. The "Select Facility," "Select IRMS," or the "Access Granted" window.

Figure 4-4: Select Facility

- a) When the "Select Facility" or "Select IRMS" window appears, click the drop-down arrow to select a Facility/IRMS and then click the **CONTINUE** button; OR, click on **CANCEL** to not select a facility and assume the IRMS Client access and privileges.

**Note:** A facility is used to limit your lot number selection when administering shots.

Figure 4-5: Access Granted

- b) The "Access Granted" window appears when you have entered an accurate Username and Password. If you do not see this window, you can click on the Forgot Password link, if your state uses it, or contact your administrator for a new Password.



- Depending on your access authorization, different menus and options may be available. Available options display in **bold** lettering, unavailable options display in gray.
6. You are ready to select from the Menu and begin using the application. Continue to the next section.

## FORGOT PASSWORD

The "Forgot Password" option is a hyperlink that is state configurable by your System Administrator. It is used when you don't remember your password. You can click on this hyperlink and request a new password be sent to you.

If you have forgotten your password and need to request a new one, perform the following:

1. Click the **FORGOT PASSWORD** link. The "Forgot Password" window appears.

Figure 4-6: Forgot Password

STC-Forgot Password

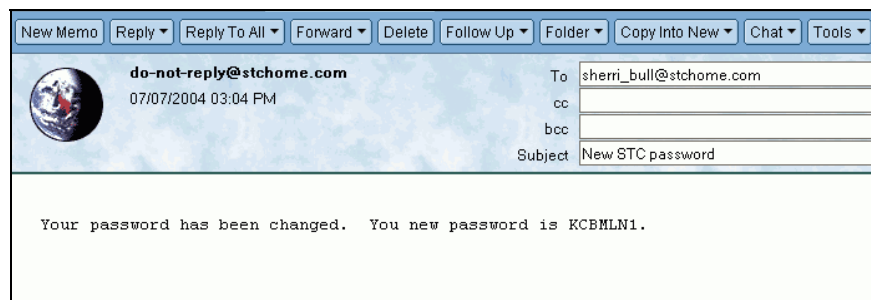
Your password will be reset, and the new one emailed to your email address on file.  
Please enter either your Username or Email Address.

User Name:

Email:

2. Type one of the following
  - **USERNAME** – type your username. If you type your username, your new password will be emailed to your email address on file.
  - **EMAIL** – type your email address. If you type our email address, your new password will be emailed to this email address versus the one on file.
3. Click the **SEND** button. The system will generate an automatic and immediate response and reply to your request by sending the new password in an email (similar to the one shown below).

Figure 4-7: New Password Assignment Email Reply



4. Log into the application using the **NEW PASSWORD**.
5. From the Menu, click on the **CHANGE PASSWORD** hyperlink (also state configurable) to change your password to what you want it to be. The "Change Password" window appears.

Figure 4-8: Change Password

Change Password	
Current Password:	<input type="text"/>
New Password:	<input type="text"/>
New Password (again):	<input type="text"/>
<input type="button" value="Reset"/> <input type="button" value="Submit"/>	

6. Type the **CURRENT PASSWORD** (the one you just received via email), and press the TAB key.
7. Type the **NEW PASSWORD** (to what you want it to be) and press the TAB key.
8. Type the **NEW PASSWORD** again and click one of the buttons:
  - **RESET** – erases the data from the fields you typed in and prepares the window for you to re-enter data.
  - **SUBMIT** – saves your entries and changes your password.

Figure 4-9: Password Changed Successfully Message

<p>Password changed successfully</p>
--------------------------------------

9. It is not necessary to log out and back on but the next time you login, use the new password.

## LOGGING OUT OF THE APPLICATION

When you are finished using the application, you should log out of the application.

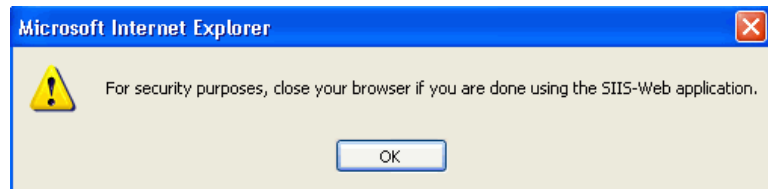


## Main Menu: Logging In and Out

- 
1. From the **MAIN** menu, point and click on the **Logout** option. A dialog box appears indicating to close the browser if you are finished.

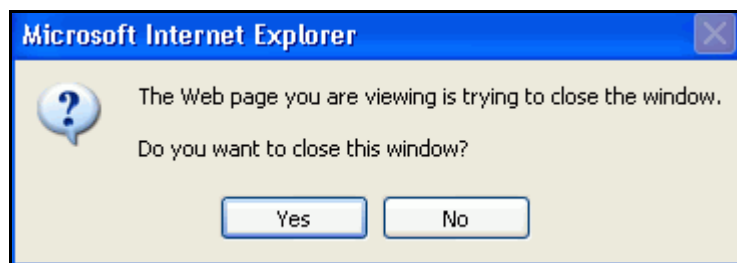


Figure 4-10: Close Browser Dialog Box



2. Click the **OK** button. Another "Internet Explorer" dialog box appears.

Figure 4-11: Web Page Closure Verification Dialog Box



3. Click the **YES** button to close the browser window. The application and browser window are completely logged off.



## 5 ABOUT THE APPLICATION

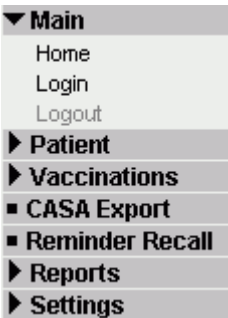

This section describes the application characteristics that are used on all the windows and includes tips for entering text and using the keyboard and mouse.

**Note:** Refer to the "SIIS Installation Guide" for the SIIS-IWEB System Requirements.




### APPLICATION CHARACTERISTICS

Common features on the application windows are described in the table.

Table 5-1: Application Characteristics

APPLICATION CHARACTERISTICS	
<b>MENUS &amp; OPTIONS</b> 	<p>Every application will have a Menu displayed on the left side. Directly below the Menu Name are options that are available. If an option is "grayed" out, it is not an available option.</p> <ul style="list-style-type: none"><li>• An upside down triangle indicates the menu is open.</li><li>• A triangle pointing right indicates the menu is closed.</li><li>• A square indicates a single menu without options.</li></ul> <p>Click on the triangle to open the menu to view its options and/or to close the menu. Click the square to open the menu.</p>
<b>DROP-DOWN MENUS</b> 	<p>Drop-down menus are displayed when the drop-down arrow is clicked. A list of valid entries will appear in alphabetical order or the most frequently used order. While the menu is displayed, you may type the first letter of the word and the highlighter will position on the first occurrence. To locate the next occurrence, type the letter again.</p>
<b>MANDATORY FIELD ENTRIES</b>	<p><b>RED</b> field labels indicate an entry is required before proceeding.</p>



APPLICATION CHARACTERISTICS	
<b>CHECK BOXES</b> 	Press the <b>TAB</b> key to move through the checkboxes. Press the keyboard <b>SPACEBAR</b> (or point and click) to select the item next to the checkbox, or press it again to deselect the item.
<b>RADIO BUTTONS</b> 	Press the <b>TAB</b> key to move to the desired set of radio buttons. Press the directional keyboard <b>ARROW</b> (or point and click) to select (highlight) the desired radio button.
<b>SELECT ARROWS</b> 	Select arrows appear when there is a list of items to choose from. They appear after a search result displays. Point and click it to select the item it is pointing to.
<b>ERROR MESSAGES</b>	If the wrong type of data is entered into a field, an error message appears usually at the top of the window.
<b>NOTE: WHILE EDITING, THE PATIENT'S RECORD WILL BE LOCKED FROM ANY OTHER USER ACCESSING IT. REMEMBER TO "SAVE" WHEN FINISHED EDITING.</b>	

## ENTERING DATA INTO THE FIELDS

When entering data into the fields, the following information describes the recommended methods.

**Table 5-2: Entering Data into Fields**

ENTERING DATA INTO THE FIELDS	
<b>DATA STORAGE (UPPERCASE)</b>	The application is not case-sensitive and data is stored (in the database) in capital (uppercase) letters.
<b>DATES</b>	<p>The application pads the date fields with a forward slash (/) between month, day, and year. Dates can be entered in the following formats:</p> <p>mmddyyyy</p> <p>mmddyy</p>



ENTERING DATA INTO THE FIELDS	
<b>SOCIAL SECURITY NUMBER</b>	The application pads the social security number with the dash (-) in the appropriate places. You may enter the numbers without dashes; i.e., 123456789
<b>PHONE AND FAX NUMBERS</b>	The application pads the phone and fax numbers with parenthesis ( ) for the area code and a dash (-) between the three digit prefix and four digit suffix. You may enter phone and fax numbers without the dashes and parenthesis; i.e., #####
<b>ZIP CODES</b>	The application pads the zip code fields with a dash ( - ) if the entire 9-digit number is entered. Zip codes can be entered as 5-digits or 9-digits without the dash(es).

## USING THE KEYBOARD AND MOUSE

When using the keyboard and mouse, the following information in the table describes some suggestions.

Table 5-3: Keyboard, Editing Keys, and Mouse

KEYBOARD, EDITING KEYS, AND MOUSE	
<b>TAB</b>	All the fields have a "TAB" order. This means when the cursor is in a field and the TAB key is pressed, it will move the cursor to the next field.
<b>ALT TAB</b>	By pressing the "ALT with TAB," the cursor will move backward to the previous field.
<b>ENTER</b>	Pressing the "ENTER" key on most windows, executes the function to process the active page. For example, while on the Patient Search window, the ENTER key will execute the Search function.  An exception to this rule is when the TAB key is pressed that highlights a button, the ENTER key executes the button that is highlighted.
<b>Note:</b> The Cut, Copy, and Paste functions may work differently on some windows and/or computers. Try using different combinations to get the desired result.	



KEYBOARD, EDITING KEYS, AND MOUSE	
<b>CUT</b>	<p>Highlight the data to be cut, then perform one of the following:</p> <ul style="list-style-type: none"><li>• CTRL + X</li><li>• Right-click the mouse and select Cut from the menu</li><li>• Select Edit from the toolbar and then select Cut</li><li>• Shift + Delete</li></ul>
<b>COPY</b>	<p>Highlight the data to copy, then perform one of the following:</p> <ul style="list-style-type: none"><li>• CTRL + C</li><li>• Right-click the mouse and select Copy from the menu</li><li>• Select Edit from the toolbar and then select Copy</li><li>• CTRL + Insert</li></ul>
<b>PASTE</b>	<p>Left-click the mouse where you want to place the data and perform one of the following:</p> <ul style="list-style-type: none"><li>• CTRL + V</li><li>• Right-click the mouse and select Paste from the menu</li><li>• Select Edit from the toolbar and then select Paste</li><li>• Shift + Insert</li></ul>
<b>SCROLL MOUSE</b>	<p>The scrolling mouse wheel can be used to scroll through selected drop-down lists and current web page, if the mouse is programmed correctly.</p>



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## USER TASK MAPS – WHERE TO START (AT-A-GLANCE)

There are three task maps shown on the next three pages. The first map guides you through the **initial setup tasks that should be done** to setup the application and the order in which to perform them. The second map reveals **frequently used tasks**, and the third map shows you **other available tasks**.

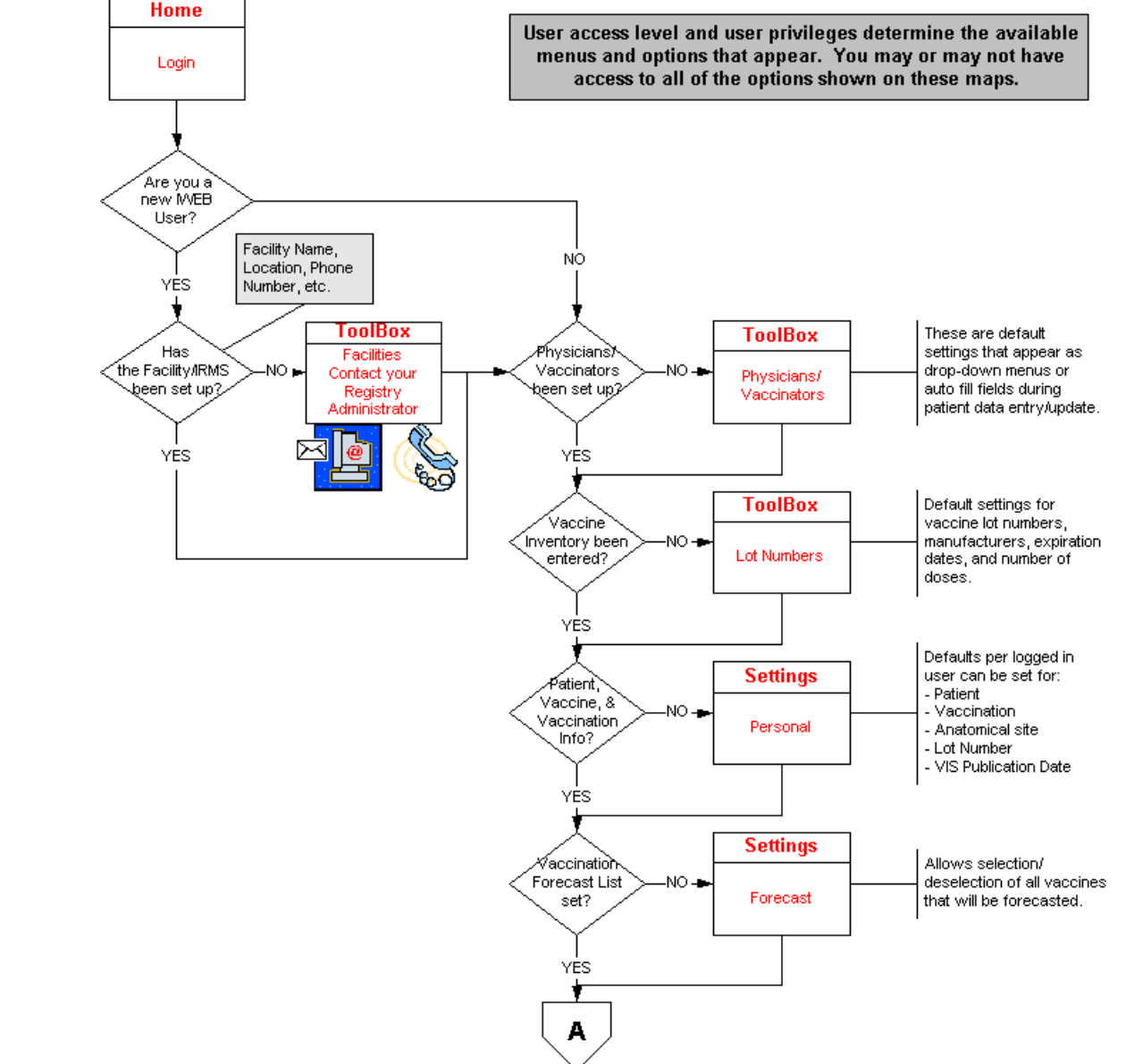
These maps also show which menu option to use in order to complete the task.

It is assumed that you know your user access level and whether you are a **Client** (able to make changes) or a **Viewer** (view only—cannot make changes).

Please contact your local area Help Desk if you are unsure what type of access you have, or if you believe you require a different level of access.

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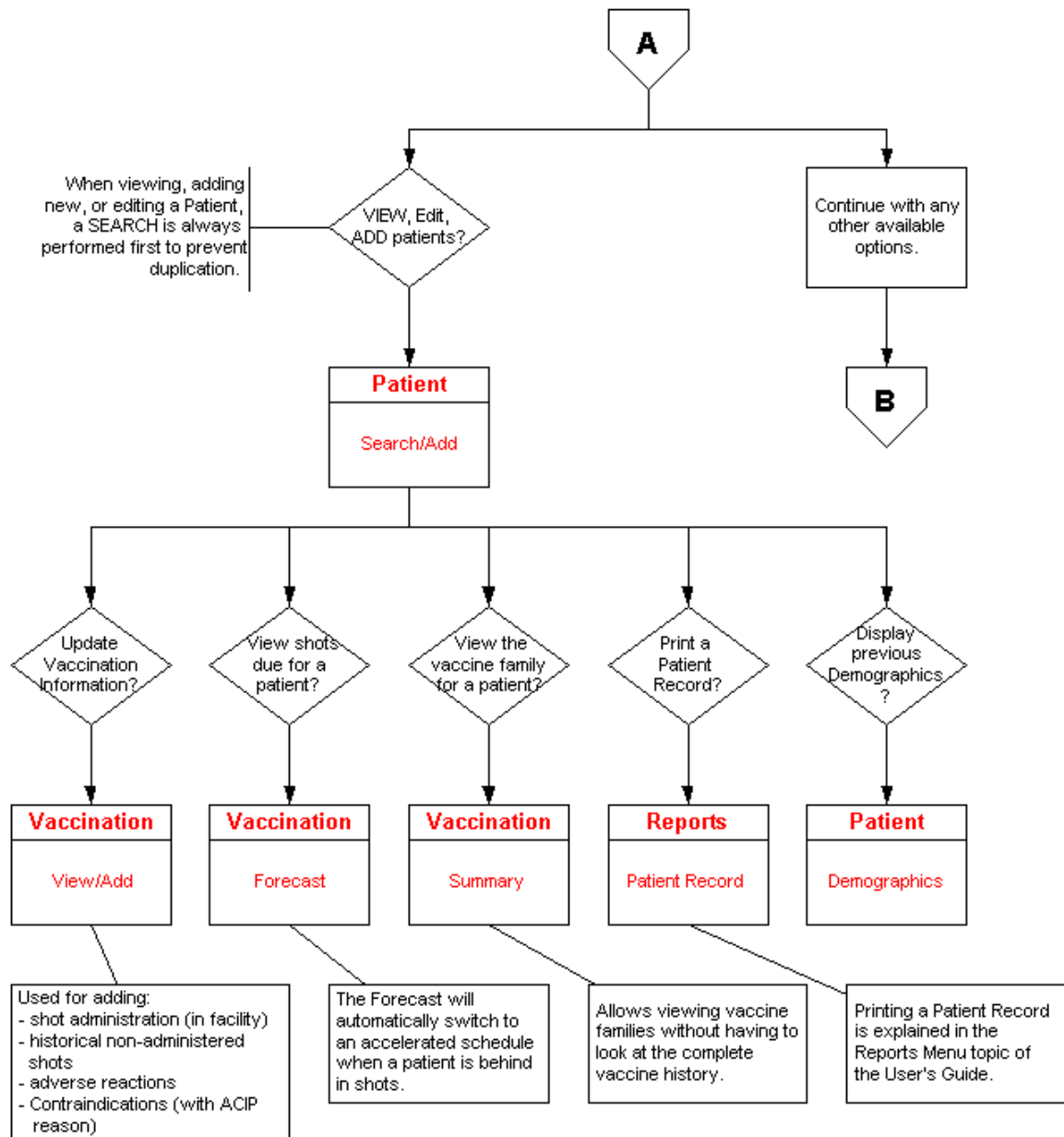




## FREQUENTLY-USED TASKS

This map reveals frequently used options.

Figure 5-2: Frequently Used Tasks

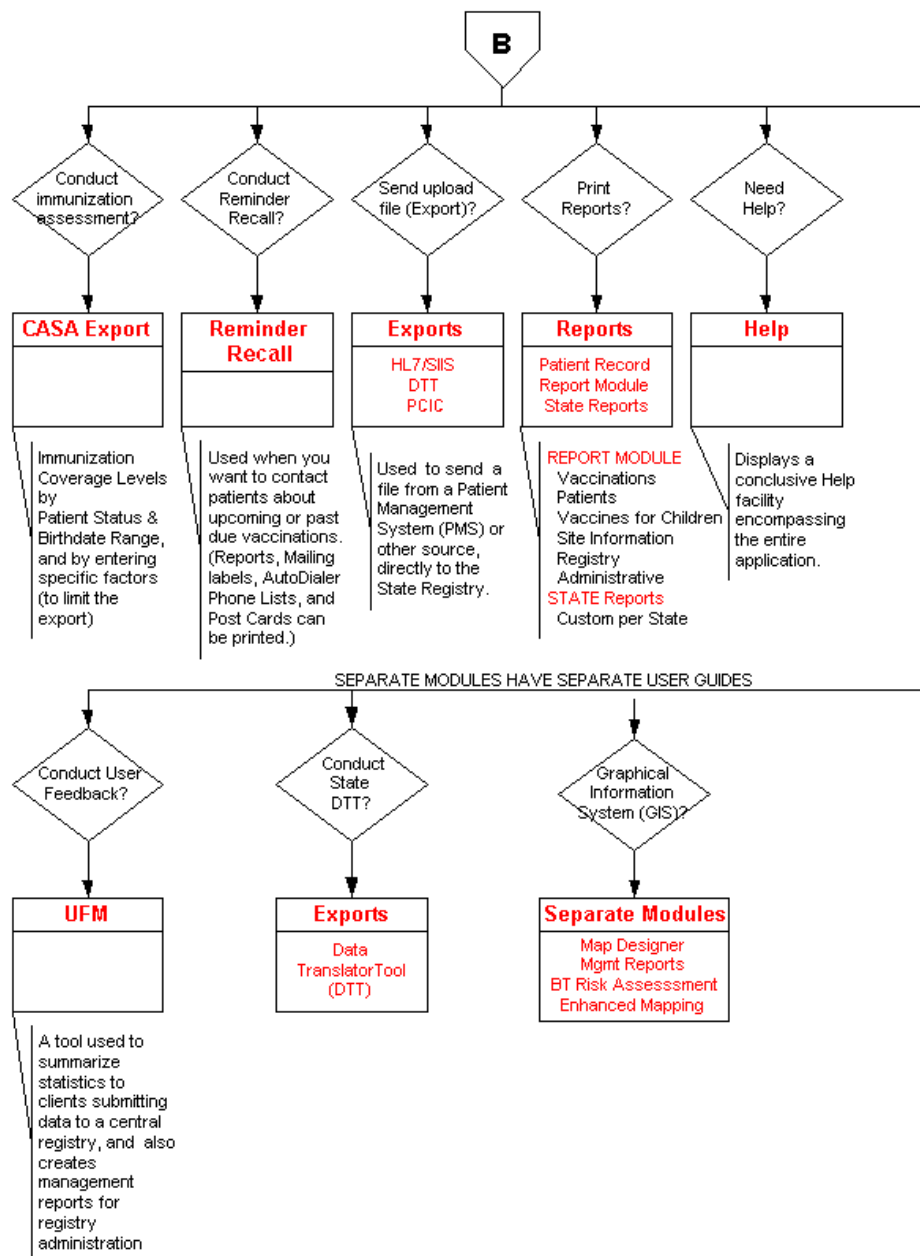




## OTHER AVAILABLE TASKS

This map reveals additional tasks that are available.

Figure 5-3: Other Available Tasks





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## 6 PHYSICIANS/VACCINATORS MENU

The purpose of the PHYSICIANS/VACCINATORS MENU is to Search, Add, and Edit names of Physicians/Vaccinators for consistency, and to avoid data entry redundancy. By adding these names, allows the fields on corresponding windows to automatically display names.

A physician is the primary care physician for the patient and can be selected on the patient record. A Vaccinator is a person that administers shots and can also be selected on the vaccination record.

### SEARCHING FOR PHYSICIANS AND/OR VACCINATORS

A search is always performed prior to adding or updating any items to the IWEB application.

1. From the **PHYSICIANS/VACCINATORS** menu, point and click on the **Search (/ADD)** option. The "Physician/Vaccinator Maintenance" window appears.

Figure 6-1: Physician/Vaccinator Maintenance

Physician/Vaccinator Maintenance						
Search/Add Physician or Vaccinator - Search Required Before Adding						
<input type="radio"/> Physician <input type="radio"/> Vaccinator <input type="radio"/> Both <input checked="" type="radio"/> Entire List						
<input type="checkbox"/> Physician/Vaccinator Last Name:					<input type="text"/>	<input type="button" value="Search"/>
<input type="checkbox"/> Facility:					--select--	
Search Results						
Select	First Name	Middle Name	Last Name	Suffix	Inactive	Type

2. Determine the type of search to perform:
  - If you know (s)he is either a Physician or Vaccinator, point and click on either the **PHYSICIAN** or **VACCINATOR** radio button, respectively.
  - If you are sure that (s)he is a Physician AND a Vaccinator, point and click on the **BOTH** radio button.
  - If you are unsure if (s)he is a Physician, Vaccinator, or Both, point and click on the **ENTIRE LIST** radio button.



3. If you know the Physician/Vaccinator's Last Name or know the first few letters, type the letters or the entire name in the LAST NAME field.

**Note:** As soon as you start typing, the Physician/Vaccinator **LAST NAME** checkbox will automatically be selected.

4. If you know the **FACILITY** name, select it from the drop-down menu; or, type the first letter of the name to position the highlighter for the group. Each time you type the same letter, the next occurrence will be highlighted.

**Note:** If a Facility Display (Abbreviated) Name was entered, it will appear in the list as opposed to the full name of the facility.

5. Point and click the **SEARCH** button. The Physician/Vaccinator Maintenance **SEARCH RESULTS** window appears (either with a result or not).

Figure 6-2: Physician/Vaccinator Maintenance with Results

Physician/Vaccinator Maintenance						
Search/Add Physician or Vaccinator - Search Required Before Adding						
<b>Search Criteria:</b>						
Type: <b>Entire List</b>						
Physician/Vaccinator Last Name:					<b>Back to Search</b>	
Facility: <b>STC</b>						
Search Results						
Select	First Name	Middle Name	Last Name	Suffix	Inactive	Type
<input type="checkbox"/>	SIDNEY		MCCLINTON	MD		P
						<b>Add a Physician /Vaccinator</b>

6. Click one of the buttons:
  - **BACK TO SEARCH** – to perform a new search. Repeat from step two above.
  - **ADD A PHYSICIAN/VACCINATOR** – to continue to add a physician/vaccinator. The "Physician/Vaccinator Maintenance ADD" window appears. Continue to the next section for instructions.



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## ADDING A PHYSICIAN/VACCINATOR

Enter the names of those within your facility who will be primary care physicians and those who will be administering vaccines; thus vaccinators.

1. From the "Physician/Vaccinator Search Results" window, click the **ADD a PHYSICIAN/VACCINATOR** button. The "Physician/Vaccinator Maintenance [Add]" window appears.

**Figure 6-3: Physician/Vaccinator Maintenance[Add]**

Physician/Vaccinator Maintenance [Add]	
<b>First Name:</b>	<input type="text"/>
Middle Name:	<input type="text"/>
<b>Last Name:</b>	<input type="text"/>
Suffix	--none-- <input type="button" value="v"/>
SSN:	<input type="text"/>
BOMEX:	<input type="text"/>
DO:	<input type="text"/>
Medicaid PIN:	<input type="text"/>
Medicaid Group:	<input type="text"/>
Facility:	STC
Phone Number:	<input type="text"/>
Phone Number Extension:	<input type="text"/>
Fax Number:	<input type="text"/>
Email:	<input type="text"/>
District/Region:	<input type="text"/>
Inactive:	<input type="checkbox"/>
Automatic Ownership Blocked:	<input type="checkbox"/>
<b>Type:</b>	<input type="radio"/> Physician <input checked="" type="radio"/> Vaccinator <input type="radio"/> Both
<div>Cancel Add This Physician / Vaccinator</div>	

2. It is recommended to type in as much information as possible. The fields and their descriptions are defined in the table below. At a minimum, fill in the "RED labeled" fields.

**Note:** Phone number is configurable by state and may not be a requirement for you.



Table 6-1: Physician/Vaccinator Maintenance Fields

FIELD	DESCRIPTION OF USE
<b>FIRST NAME</b>	Name of the Physician or Vaccinator you are adding. This is a required field.
<b>MIDDLE NAME</b>	Middle Name of the Physician or Vaccinator you are adding.
<b>LAST NAME</b>	Last Name of the Physician or Vaccinator you are adding. This is a required field.
<b>SUFFIX</b>	Suffix at the end of the Physician or Vaccinator's name. A few examples are: <ul style="list-style-type: none"> <li>• ARNP - Advanced Registered Nurse Practitioner</li> <li>• ND – Naturopathic Doctor</li> <li>• MD – Medical Doctor</li> <li>• RN – Registered Nurse</li> </ul>
<b>SSN</b>	Social Security Number of the Physician or Vaccinator.
<b>BOMEX</b>	An acronym used by the state of Arizona that means <b>B</b> oard of <b>M</b> edical <b>E</b> xaminers license number.
<b>DO</b>	Doctor of Osteopathy state assigned license number.
<b>MEDICAID PIN</b>	Medicaid Pin Number.
<b>MEDICAID GROUP</b>	Medicaid Group Number.
<b>FACILITY</b>	Facility name where the physician/vaccinator will be working.  <b>Note:</b> If a Facility Display (Abbreviated) Name was entered for the facility, it will appear in the list as opposed to the full name of the facility.
<b>PHONE NUMBER</b>	Telephone number of the Physician or Vaccinator.
<b>PHONE NUMBER EXTENSION</b>	Extension number of the Physician or Vaccinator's phone number.
<b>FAX NUMBER</b>	Facsimile number of the Physician or Vaccinator.
<b>EMAIL</b>	Email address of the Physician or Vaccinator.



FIELD	DESCRIPTION OF USE
<b>DISTRICT/REGION</b>	This must be a whole number and be known by the user adding/editing the facility. <b>Note:</b> A state configurable option is available to have the District field automatically populate.
<b>INACTIVE</b>	If the checkbox contains a "check," the Physician/Vaccinator is INACTIVE; otherwise, the Physician/Vaccinator is ACTIVE. Since records cannot be deleted, placing the Physician/Vaccinator inactive, flags it so it cannot be used.
<b>AUTOMATIC OWNERSHIP BLOCKED</b>	If the checkbox contains a check, this physician CANNOT own a patient. The Physician will not display in the Physician drop-down list on the patient demographics screen.
<b>TYPE</b>	Click on the corresponding radio button for the type: Physician, Vaccinator, or both.

3. Click the **ADD THIS PHYSICIAN / VACCINATOR** button to officially add; or, click **CANCEL** to NOT add. The "Physician/Vaccinator Maintenance - Search" window reappears.


## EDITING PHYSICIANS AND/OR VACCINATORS

To edit an existing Physician or Vaccinator, perform the following:

1. From the **PHYSICIANS/VACCINATORS** menu, point and click on the **SEARCH (/ADD)** option. The "Physician/Vaccinator Maintenance – Search" window appears.
2. Perform a **SEARCH** (Refer to the previous sections if necessary.). The "Physician/Vaccinator Maintenance Search Results" window appears.



Figure 6-4: Physician/Vaccinator Maintenance Select Button

Physician/Vaccinator Maintenance						
Search/Add Physician or Vaccinator - Search Required Before Adding						
Search Criteria:						
Type: <b>Entire List</b>						
Physician/Vaccinator Last Name:					<b>Back to Search</b>	
Facility: <b>STC</b>						
<b>Search Results</b>						
Select	First Name	Middle Name	Last Name	Suffix	Inactive	Type
	SIDNEY		MCCLINTON	MD		P
						<b>Add a Physician / Vaccinator</b>

- Point and click on the **SELECT ARROW** to the left of the First Name. The "Physician/Vaccinator Maintenance [Detail]" window appears.

Figure 6-5: Physician/Vaccinator Maintenance [Detail]

Physician/Vaccinator Maintenance [Detail]	
<b>First Name:</b>	SIDNEY
Middle Name:	
<b>Last Name:</b>	MCCLINTON
Suffix:	MD
SSN:	
BOMEX:	1
DO:	
Medicaid PIN:	
Medicaid Group:	
Facility:	STC
Phone Number:	(602)241-1502 Ext: 1112
Fax Number:	(602)241-1856
Email Address:	
District/Region:	
Inactive:	
Automatic Ownership Blocked:	
<b>Type:</b>	Physician
<b>Update Physician / Vaccinator</b>	
Signature:	

- Click the **UPDATE PHYSICIAN/VACCINATOR** button. The "Physician / Vaccinator Maintenance [Update]" window appears.



Figure 6-6: Physician/Vaccinator Maintenance [Update]

Physician/Vaccinator Maintenance [Update]	
First Name:	<input type="text" value="SIDNEY"/>
Middle Name:	<input type="text"/>
Last Name:	<input type="text" value="MCCLINTON"/>
Suffix:	<input type="text" value="MD"/>
SSN:	<input type="text"/>
BOMEX:	<input type="text" value="1"/>
DO:	<input type="text"/>
Medicaid PIN:	<input type="text"/>
Medicaid Group:	<input type="text"/>
Facility:	<input type="text" value="STC"/>
Phone Number:	<input type="text" value="(602)241-1502"/>
Phone Number Extension:	<input type="text" value="1112"/>
Fax Number:	<input type="text" value="(602)241-1856"/>
Email:	<input type="text"/>
District/Region:	<input type="text"/>
Inactive:	<input type="checkbox"/>
Automatic Ownership Blocked:	<input type="checkbox"/>
Type:	<input checked="" type="radio"/> Physician <input type="radio"/> Vaccinator <input type="radio"/> Both
<div>Cancel Reset Values Update Now</div>	

5. Type the new information into the appropriate field(s) and press one of the following buttons:
  - **CANCEL** – to NOT update and return to the "Physician / Vaccinator Search/Add" window.
  - **RESET VALUES** – to erase your newly entered data and redisplay the previous data.
  - **UPDATE NOW** – to save your new information and return to the "Physician / Vaccinator [Detail]" window.

## PHYSICIANS/VACCINATORS SEARCH RESULTS

This option re-displays the search results from a previous **PHYSICIAN/VACCINATOR SEARCH**. If a Physician/Vaccinator Search has not been performed, this option will be grayed out; hence, will be unavailable to you until a search is performed.

1. From the **PHYSICIANS/VACCINATORS** menu, point and click **SEARCH (/ADD)**.
2. Perform a **Physician/Vaccinator Search**.



3. From the **PHYSICIANS/VACCINATORS** menu, point and click **SEARCH RESULTS**. The "Physicians/Vaccinator's Search Results" window appears.

Physician/Vaccinator Maintenance						
Search/Add Physician or Vaccinator - Search Required Before Adding						
<b>Search Criteria:</b>						
Type: <b>Entire List</b>						
Physician/Vaccinator Last Name:					<b>Back to Search</b>	
Facility: <b>STC</b>						
Search Results						
Select	First Name	Middle Name	Last Name	Suffix	Inactive	Type
<input type="checkbox"/>	SIDNEY		MCCLINTON	MD		P
						<b>Add a Physician /Vaccinator</b>

## PHYSICIANS/VACCINATORS DETAIL

This option re-displays the physician/vaccinator's **DETAIL** from a previously displayed Physician/Vaccinator Detail. If a Physician/Vaccinator Search has not been performed, the **DETAIL** option will be grayed out; hence, will be unavailable to you until a search is performed.

1. From the **PHYSICIANS/VACCINATORS** menu, point and click **SEARCH (/ADD)**.
2. Perform a **Physician/Vaccinator Search**.
3. From the **PHYSICIANS/VACCINATORS** menu, point and click **DETAIL**. The "Physician/Vaccinator Maintenance [Detail]" window appears.



## Physicians/Vaccinators Menu

Physician/Vaccinator Maintenance [Detail]	
<b>First Name:</b>	SIDNEY
Middle Name:	
<b>Last Name:</b>	MCCLINTON
Suffix:	MD
SSN:	
BOMEX:	1
DO:	
Medicaid PIN:	
Medicaid Group:	
Facility:	STC
Phone Number:	(602)241-1502 Ext: 1112
Fax Number:	(602)241-1856
Email Address:	
District/Region:	
Inactive:	
Automatic Ownership Blocked:	
<b>Type:</b>	Physician

[Update Physician / Vaccinator](#)

Signature:

4. If you want to edit the Physician/Vaccinator information, click on the **UPDATE PHYSICIAN/VACCINATOR** button. Refer to the previous section for instructions, or click on a different menu option.



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## 7 LOT NUMBERS MENU

The purpose of the **LOT NUMBERS MENU** is for authorized users to Search, Add, and Edit names of Lot Numbers for consistency and to avoid data entry redundancy.

A "state configurable" option for a Facility Inventory Manager can be setup for a facility to allow facility-wide lot number defaults to be used. If a user does NOT have Lot Number defaults set up in their Personal Settings, the Inventory Manager's defaults will be used; however, if the user DOES have Lot Defaults setup in their Personal Settings, the Facility Inventory Manager's settings will not override them.

### SEARCHING LOT NUMBERS

A search is always performed prior to adding or updating any items to the IWEB application.

1. From the **LOT NUMBERS** menu, point and click on the **SEARCH (/ADD)** option. The "Lot Number Maintenance—Search(/Add) window appears.

Figure 7-1: Lot Number Maintenance / Search

Lot Number Maintenance							
Search/Add Lot Number - Search Required Before Adding							
<input type="checkbox"/>	Vaccine	--select--					
<input type="checkbox"/>	Manufacturer	--select--					
<input type="checkbox"/>	Lot Number						Search
<input type="checkbox"/>	Facility:	--select--					
Sort By:		Manufacturer					
Search Results							
Select	Facility	Manufacturer	Lot Number	Vaccine	Pub Supp	Exp. Date	Inactive

2. Determine the type of search you want to perform and either point and click the **DROP-DOWN ARROW(S)** or type the Lot Number. The search criteria can be none, one, or a combination of the following:



- Vaccine (drop-down list)
- Manufacturer (drop-down list)
- Lot Number (type the number)
- Facility (drop-down list)
- If you make a selection from the drop-down lists or type in the lot number field, the checkboxes will automatically get selected (checked).

If a Facility Display (Abbreviated) Name was entered for the facility, it will appear in the list as opposed to the full name of the facility.

3. Click the drop-down arrow to view/select a valid choice to **SORT** the Lot Numbers.
4. Press the **SEARCH** button or the **ENTER** key. The "Lot Number Maintenance Search Results" window appears similar to the one shown (below the note).

**Note:** Vaccine (DTaP) and Facility (Test) was used to obtain this result.

Figure 7-2: Lot Number Maintenance with Search Result

Lot Number Maintenance							
Search/Add Lot Number - Search Required Before Adding							
<b>Search Criteria:</b>							
Vaccine: <b>DTaP</b>							
Manufacturer:							
Lot Number:							
Facility: <b>TEST</b>							
							<b>Back</b>
Search Results							
Select	Facility	Manufacturer	Lot Number	Vaccine	Pub Supp	Exp. Date	Inactive
<input type="checkbox"/>	TEST	ABBOT	9514532	DTaP	Y	01/01/2008	
							<b>Add</b>

5. Point and click one of the buttons:
  - **SELECT ARROW** – to perform an **EDIT** on the chosen Lot. Continue to the section titled, "Editing Lot Numbers;" or,



- **BACK** – to perform another **SEARCH**; repeat the previous steps; or,
  - **ADD** – to **ADD** a new Lot Number. Continue to the next section titled, "Adding Lot Numbers."
6. Continue to the appropriate section for detailed instructions.

## ADDING LOT NUMBERS

A search is always performed prior to adding any items to the IWEB application.

1. From the **LOT NUMBERS** menu, point and click on the **SEARCH (/ADD)** option. The "Lot Number Maintenance—Search(/Add)" window appears.
2. Perform a search by selecting/typing your search criteria (refer to the previous section for instructions) and press the **SEARCH** button or **ENTER** key. The "Lot Number Maintenance Search Results" window appears.
3. Click on the **ADD** button to add a new Lot Number. The "Lot Number Maintenance [Add]" window appears.

Figure 7-3: Lot Number Maintenance Add

Lot Number Maintenance [Add]	
<b>Manufacturer:</b>	--select--
<b>Lot Number:</b>	
<b>Vaccine</b>	DTaP
Facility:	TEST
<b>Expiration Date:</b>	
Publicly Supplied:	<input checked="" type="radio"/> Yes <input type="radio"/> No (Local Purchase)
Inactive:	<input type="checkbox"/>
<div>Cancel Add</div>	

4. At a minimum, fill in the "**RED labeled**" fields. It is recommended to fill in as much information as possible. Refer to the table for a list of fields and definitions.



Table 7-1: Lot Number Fields

FIELD	DESCRIPTION OF USE
<b>MANUFACTURER</b>	Manufacturer name of the vaccine. Click on the drop-down arrow for a list of valid choices. This is a required field.
<b>LOT NUMBER</b>	Lot number for the vaccine. Type the Lot Number. This is a required field.
<b>VACCINE</b>	<p>Name of the Vaccine. Click on the drop-down menu arrow for a list of valid choices. This is a required field.</p> <p>If you attempt to create a new vaccine lot of an "unspecified" vaccine type (e.g., Hib – Unspecified), a warning message appears at the top of the window to alert the user that this action is not recommended. The message states, "Vaccine is unspecified, are you sure you want to add?" You will be required to click the checkbox verifying that you want to continue in order to add the unspecified vaccine.</p>
<b>FACILITY</b>	<p>Name of the facility associated with the vaccine. Click on the drop-down arrow for a list of valid choices.</p> <p><b>Note:</b> If a Facility Display (Abbreviated) Name was entered for the facility, it will appear in the list as opposed to the full name of the facility.</p>
<b>EXPIRATION DATE</b>	Date the vaccine is no longer valid for use. If a lot number does not include an expiration day within the expiration date, use the last day of the month to complete the date. The format must be mm/dd/yyyy.
<b>PUBLICLY SUPPLIED</b>	Indicates whether the vaccine was publicly supplied or not. Click the radio button for yes or no.
<b>INACTIVE</b>	Indicates whether the vaccine is inactive or not. If the checkbox contains a "check," the Lot Number is INACTIVE; otherwise, the Lot Number is ACTIVE. Since records cannot be deleted, placing the Lot Number inactive flags it so it cannot be used.

5. Point and click on one of the buttons or the state-configurable checkbox:



- 
- **CANCEL** – to NOT add and return to the "Lot Number Maintenance Search(/Add)" window.
  - **IGNORE UNSPECIFIED WARNING AND ADD LOT NUMBER** (checkbox) – to ignore the warning and continue to add. This is a state-configurable checkbox and may not appear.
  - **ADD** – to access the "Add to Total Doses" window. The "Add to Total Doses" window appears. Continue to the section titled, "Adding/Subtracting Doses."

**Note:** Once you click the ADD button, you cannot CANCEL the addition. Instead, you will need to "Inactivate" it. Refer to the section titled, "Inactivating a Lot" for instructions.

## EDITING LOT NUMBERS

As long as no vaccinations have been administered from an existing lot, you can edit the lot number, manufacturer, and vaccine type to correct data entry mistakes.

**Note:** If a shot has been administered from a lot, even if deleted, a user will no longer be able to edit lot number.

1. From the **LOT NUMBERS** menu, point and click on the Search (/Add) option. The "Lot Number Maintenance—Search(/Add)" window appears.
2. Perform a search by selecting/typing your search criteria (refer to the previous section for instructions) and press the **SEARCH** button or the **ENTER** key. The "Lot Number Maintenance Search Results" window appears.
3. Click on the **SELECT ARROW** on the Lot you want to edit. The "Lot Number Maintenance [Detail]" window appears.

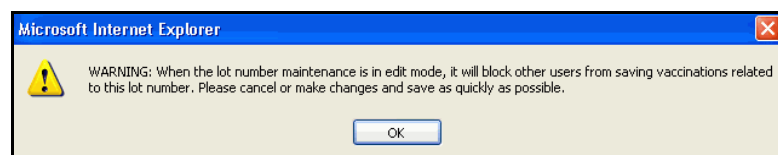


Figure 7-4: Lot Number Maintenance Detail

Lot Number Maintenance [Detail]	
<b>Manufacturer:</b>	ABBOT
<b>Lot Number:</b>	54
<b>Vaccine:</b>	DTaP
Facility:	TEST
Doses Used:	0
Doses Wasted:	0
Doses Available:	150
Doses Total:	150
<b>Expiration Date:</b>	12/31/2008
Publicly Supplied:	Y
Inactive:	

4. Click on one of the buttons:
  - **BACK** – to return to the previous window.
  - **VIEW LOT LOG** – to view the log for this lot. Refer to the section titled, "Viewing Lot Logs and Offsite Lot Logs" for instructions.
  - **VIEW OFFSITE LOG** – to view Offsite Logs. Refer to the section titled, "Viewing Lot Logs and Offsite Lot Logs" for instructions
  - **EDIT** – to edit Lot Number Details. A warning message displays.

Figure 7-5: Lot Number Record Lock Warning Dialog



**Note:** This is a warning telling you that your edits will prevent others from using this lot while you are editing. You want to make your edits as quickly as possible.

5. Click **OK** to continue. The "Lot Number Maintenance [Update]" window appears.



Figure 7-6: Lot Number Maintenance Update

Lot Number Maintenance [Update]	
<b>Manufacturer:</b>	AB-ABBOT
<b>Lot Number:</b>	54
<b>Vaccine:</b>	DTaP
<b>Facility:</b>	TEST
Doses Used:	0
Doses Wasted:	0
Doses Available:	150
Doses Total:	150 Use the buttons below to adjust the total doses.
<b>Expiration Date:</b>	12/31/2008
Publicly Supplied:	<input checked="" type="radio"/> Yes <input type="radio"/> No (Local Purchase)
Inactive:	<input type="checkbox"/>

To update a lot number, enter your lot number information above. Complete as many of the fields as possible. Required fields are indicated by **red** text.

If you are going to modify Doses Total, do that before modifying the other fields or your changes will be undone.

**Expiration Date Format:** mm/dd/yyyy

- Modify the Doses Totals before modifying other fields.
6. If you are adding/subtracting doses, continue to the section titled, "Adding/Subtracting Doses"; otherwise, continue to the next step.
  7. If editing other fields excluding the addition/subtraction of doses, make your editing changes and then click one of the available buttons:
    - **SAVE** - to access the "Lot Number Maintenance [Detail]" window.
    - **RESET VALUES** - to erase newly typed data, redisplay the previous data, and remain on the "Lot Number Maintenance [Update]" window.
    - **CANCEL** - to NOT save and return to the "Lot Number Maintenance" window.
    - **ADD DOSES** - to access the "Add to Total Doses" window. Continue to the section titled, "Adding/Subtracting Doses."




- **SUBTRACT DOSES** - to access the "Subtract to Total Doses" window. Continue to the section titled, "Adding/Subtracting Doses."

## ADDING/SUBTRACTING DOSES

Both of these windows contain the same fields.

The "Add to Total Doses" window will appear when you have added a new lot number and when you have pressed the **ADD DOSES** button.

Figure 7-7: Add to Total Doses

Add (+) To Total Doses	
<b>Reason for Change:</b>	--select-- 
<b>Date of Transaction:</b>	08/30/2005 <small>MM/DD/YYYY</small>
<b>Number of Doses Added:</b>	<input type="text"/>
VFC PIN of other party (if applicable):	<input type="text"/>
Publicly Supplied:	Y
<div>Save</div> <div>Cancel</div>	
<small>To change number of doses, enter your dose information above. Complete as many of the fields as possible. Required fields are indicated by <b>red</b> text.</small>	

The "Subtract from Total Doses" window appears when you have pressed the **SUBTRACT DOSES** button.



Figure 7-8: Subtract from Total Doses

Subtract (-) From Total Doses	
<b>Reason for Change:</b>	--select--
<b>Date of Transaction:</b>	08/30/2005
<b>Number of Doses Subtracted</b>	
VFC PIN of other party (if applicable):	
Publicly Supplied:	Y
<div>Save</div> <div>Cancel</div>	
<p>To change number of doses, enter your dose information above. Complete as many of the fields as possible. Required fields are indicated by <b>red</b> text.</p> <p><b>Date of Transaction Format:</b> mm/dd/yyyy</p>	

To add or subtract doses, perform the following:

1. Click on the appropriate button, **ADD DOSES** or **SUBTRACT DOSES** button.
2. The fields and their descriptions are the same for both windows and are listed in the table below.

Table 7-2: Add/Subtract Doses Field Descriptions

FIELD	DESCRIPTION
REASON FOR CHANGE	Refer to the next table for a conclusive list of how the Lot Number inventory is impacted. <b>Note:</b> This is a mandatory field entry.
DATE OF TRANSACTION	Defaults to “today’s” date and automatically fills in. <b>Note:</b> This is a mandatory field entry.
NUMBER OF DOSES (ADDED OR SUBTRACTED)	Total number of doses being added or subtracted. <b>Note:</b> This is a mandatory field entry.
VFC PIN OF OTHER PARTY (IF APPLICABLE)	If the vaccine being added was VFC supplied, this field should have an entry.



FIELD	DESCRIPTION
<b>PUBLICLY SUPPLIED</b>	If the vaccine is publicly supplied, this field will contain a Y for Yes, and an N for No.

3. Click the drop-down menu arrow to view/select a valid choice for **REASON FOR CHANGE**. The Reasons and their impact are listed in the table.
  - When subtracting doses, three different adjustments can occur depending on the "Reason for the Change."

Table 7-3: Reasons for Lot Number Addition/Subtraction

REASON FOR CHANGE	EFFECTS
<b>SUBTRACT FROM TOTAL DOSES</b>	
<b>RETURNED TO VFC PROGRAM</b>	Doses <b>TOTAL</b> is decremented
<b>SENT TO ANOTHER PROVIDER</b>	Doses <b>TOTAL</b> is decremented
<b>RETURNED DIRECTLY TO VENDOR, NOT VFC SUPPLIED</b>	Doses <b>TOTAL</b> is decremented
<b>OVER ESTIMATED TOTAL DOSES</b>	Doses <b>TOTAL</b> is decremented
<b>CORRECTION OF INVALID ENTRY</b>	Doses <b>TOTAL</b> is decremented
<b>INEFFECTUAL</b>	Doses <b>TOTAL</b> is decremented
<b>SPOILED, WASTED (DROPPED, SPILLED)</b>	*Doses <b>WASTED</b> is incremented
<b>EXPIRED</b>	*Doses <b>WASTED</b> is incremented
<b>LOST DURING SHIPMENT</b>	*Doses <b>WASTED</b> is incremented
<b>DAMAGED DURING SHIPMENT</b>	*Doses <b>WASTED</b> is incremented
<b>LOST BY PROVIDER, UNACCOUNTED FOR IN PROVIDER INVENTORY</b>	*Doses <b>WASTED</b> is incremented
<b>TWO DOSES GIVEN TO BE EQUIVALENT OF NORMAL DOSAGE FOR THIS AGE PERSON</b>	Doses <b>USED</b> is incremented



REASON FOR CHANGE	EFFECTS
VACCINE USED AT REMOTE CLINIC	Doses <b>USED</b> is incremented
ADMINISTERED TO CLIENT WHO CHOSE NOT TO BE IN REGISTRY	Doses <b>USED</b> is incremented
ADD TO TOTAL DOSES	
RECEIVED FROM VFC PROGRAM	Doses <b>TOTAL</b> is incremented
RECEIVED FROM ANOTHER PROVIDER	Doses <b>TOTAL</b> is incremented
RECEIVED DIRECTLY FROM VENDOR, NOT VFC SUPPLIED	Doses <b>TOTAL</b> is incremented
UNDER ESTIMATED TOTAL DOSES	Doses <b>TOTAL</b> is incremented
CORRECTION OF INVALID ENTRY	Doses <b>TOTAL</b> is incremented
RECEIVED FROM CDC, NOT VFC SUPPLIED	Doses <b>TOTAL</b> is incremented
CORRECTION TO WASTED DOSES	Doses <b>TOTAL</b> is incremented
* Doses that are wasted are not counted as administered in the lot number totals, but are listed separately since they need to be counted as part of the original total.	

4. At a minimum, fill in the required fields (those displayed in red text).
5. Click on one of the available buttons:
  - **CANCEL** – to NOT save and access the "Lot Number Maintenance [Update] window.
  - **SAVE** – to save and display the "Lot Number Maintenance [Detail]" window.

## VIEWING LOT LOGS AND OFFSITE LOGS

To view either the Lot Number Inventory Log or the Offsite Lot Number Log, access the Lot Number Maintenance [Detail] window.

1. From the **LOT NUMBERS** menu, point and click on the Search (/Add) option. The "Lot Number Maintenance—Search(/Add) window appears.
2. Perform a **search** by selecting/typing your search criteria (refer to the previous section for instructions) and press the



**SEARCH** button or the **ENTER** key. The "Lot Number Maintenance Search Results" window appears.

3. Click on the **SELECT ARROW** on the Lot Log you want to view. The "Lot Number Maintenance [Detail]" window appears.
4. Click on one of the available buttons:
  - **VIEW LOT LOG** – to view the Lot Number Inventory Log. Continue to the respective section for instructions.
  - **VIEW OFFSITE LOG** – to view the Lot Number Offsite Log. Continue to the respective section for instructions.

## VIEWING LOT LOG (LOT NUMBER INVENTORY)

This log displays the Lot Number Inventory such as changes made to doses, reason description, date and timestamp of the change. It is used to **view** and verify changes that have been made to the LOT.

**Note:** Vaccinations for patients who "opt out" or are exempt from the registry, will be included in the central registry for inventory and CASA purposes.

1. From the **LOT NUMBER MAINTENANCE [DETAIL]** window, click on the **VIEW LOT LOG** button. The "Lot Number Inventory Log" window displays.

### Figure 7-9: Lot Number Inventory Log

Lot Number Inventory Log					
<b>Manufacturer:</b> ABBOT					
<b>Lot Number:</b> 54					
<b>Facility:</b> TEST					
Date	Dose Change	Other Party's VFC Pin	Publicly Supplied	Description	Insert Stamp
08/30/2005	150		Y	Received from another provider	08/30/2005 11:41:53 AM

[Back](#)

- No changes can be made on this window.
- 2.** This window contains intuitively named labels except for the Insert Stamp. The Insert Stamp indicates the date (mmddyyyy) and time the Lot inventory was adjusted.



3. Press the **BACK** button to return to the "Lot Number Maintenance [Detail]" window.

## VIEWING OFFSITE LOGS

If you are transporting and/or using vaccine inventory offsite, you can Add Log Records regarding the addition (Check In) or subtraction (Check Out) of doses including comments. You can also **print** the log information.

**Note:** The application will only accept one value at a time in the Check In or Check Out fields.

1. From the **LOT NUMBER MAINTENANCE [DETAIL]** window, click on the **VIEW OFFSITE LOG** button. The "Offsite Lot Number Log" window displays.

Figure 7-10: Offsite Lot Number Log

Offsite Lot Number Log			
Manufacturer: ABBOT			
Lot Number: 54			
Facility: TEST			
Date	Dose Change	Username	Comments
Print Log		Back	Add Log Record

2. Click on one of the available buttons:
  - **ADD LOG RECORD** – to add comments to the Log. Continue to the section titled, "Adding a log record."
  - **PRINT LOG** – to send the displayed log to a printer.
  - **BACK** – to return to the "Lot Number Maintenance [Detail]" window. The "Offsite Lot Number Maintenance [Add]" window appears.



## ADDING A LOG RECORD

To add a **LOG RECORD** to the Offsite Lot Number Log, perform the following:

1. From the "Offsite Lot Number Log" window, click the **ADD LOG RECORD** button. The "Offsite Lot Number Maintenance [Add]" window appears.

Figure 7-11: Add Log Record to Offsite Lot Log

Offsite Lot Number Maintenance [Add]	
<b>Manufacturer:</b>	ABBOT
<b>Lot Number:</b>	12345
<b>Facility:</b>	STC
<b>Comments:</b>	<input type="text"/>
<b>Number of Doses:</b>	Check In (+): <input type="text"/> OR Check Out (-): <input type="text"/>
<div>Cancel Reset Save Changes</div>	
<small>Check In- Check in this lot (unused vaccine) Check Out- Check out this lot</small>	

2. Fill in the "**RED labeled**" mandatory fields:
  - Comments
  - Number of Doses you're checking in/out
3. Click on one of the available buttons:
  - **SAVE CHANGES** – to save and return to the "Offsite Lot Number Log" window.
  - **RESET** – to erase newly typed entries and remain on the window.
  - **CANCEL** – to NOT save and return to the "Offsite Lot Number Log" window.



## INACTIVATING A LOT

Since **LOT NUMBERS** cannot be deleted, you will **INACTIVATE** them instead.

1. From the **LOT NUMBERS** menu, point and click on the Search(/Add) option. The "Lot Number Maintenance—Search(/Add)" window appears.
2. Perform a search by selecting/typing your search criteria (refer to the previous section for instructions) and press the **SEARCH** button or the **ENTER** key. The "Lot Number Maintenance Search Results" window appears.
3. Click on the **SELECT ARROW** for the Lot you want to Inactivate. The "Lot Number Maintenance [Detail]" window appears.
4. Click on the **EDIT LOT NUMBER** button. A warning message displays.
5. Click **OK** button on the warning dialog to continue. The "Lot Number Maintenance [Update]" window appears.

Figure 7-12: Lot Number Maintenance Update with Inactive Checkbox

Lot Number Maintenance [Update]	
<b>Manufacturer:</b>	AB-ABBOT
<b>Lot Number:</b>	54
<b>Vaccine:</b>	DTaP
<b>Facility:</b>	TEST
<b>Doses Used:</b>	0
<b>Doses Wasted:</b>	0
<b>Doses Available:</b>	150
<b>Doses Total:</b>	150 Use the buttons below to adjust the total doses.
<b>Expiration Date:</b>	12/31/2008
<b>Publicly Supplied:</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No (Local Purchase)
<b>Inactive:</b>	<input type="checkbox"/>

To update a lot number, enter your lot number information above. Complete as many of the fields as possible. Required fields are indicated by **red** text.

If you are going to modify Doses Total, do that before modifying the other fields or your changes will be undone.

**Expiration Date Format:** mm/dd/yyyy



6. Click on the **INACTIVE** checkbox.
7. Click the **SAVE** button.
8. To **EXIT** out of this window, choose another menu option.

## LOT NUMBER SEARCH RESULTS

This option re-displays the search results from a previous **LOT NUMBER SEARCH**. If a Lot Number Search has not been performed, this option will be grayed out; hence, will be unavailable to you until a search is performed.

1. From the **LOT NUMBERS** menu, point and click **SEARCH(/ADD)**.
2. Perform a **Lot Number Search**.
3. From the **LOT NUMBERS** menu, point and click **SEARCH RESULTS**. The "Lot Number Search Results" window appears. Refer to Figure 4:2 for an illustration of the window.

## LOT NUMBERS DETAIL

This option re-displays the Lot Number Maintenance **DETAIL** from a previously displayed Lot Number Maintenance Detail. If a Lot Number Search has not been performed, the **DETAIL** option will be grayed out; hence, will be unavailable to you until a search is performed.

1. From the **LOT NUMBERS** menu, point and click **SEARCH (/ADD)**.
2. Perform a **Lot Number Search**.
3. From the **LOT NUMBERS** menu, point and click **DETAIL**. The "Lot Number Maintenance [Detail]" window appears.



## 8 SETTINGS MENU

The **SETTINGS** menu provides a method to set up defaults that will expedite the data entry process by automatically populating drop-down menus and/or fields.

There categories of settings are:

- Personal
- Forecast
- HL7 Uploads

### PERSONAL SETTINGS

Personal settings are used when adding a new patient by allowing some of the patient fields to automatically fill; thus, saving data entry time. There are six categories of **PERSONAL** default settings:

- Patient
- Vaccination
- Anatomical Injection Site
- Lot
- VIS Publication Date
- User Preferences

The Personal Settings will automatically populate the fields on the Patient Demographic and Vaccination windows.

There are different types of hyperlinks to the right of the categories (point and click the red/purple hyperlink to activate the option):

- "Click to update" or "click to add"



- "Update/delete" or "update"

## ADDING/UPDATING PATIENT DEFAULTS

The Patient Defaults settings will automatically populate the fields on the Patient Demographics Edit window. To add or update Patient Defaults, perform the following:

1. From the **SETTINGS** menu, point and click on the **PERSONAL** option. The "Personal Settings" window appears.

Figure 8-1: Personal Settings

Personal Settings				
<b>Patient Defaults</b> <a href="#">click to update</a>				
Primary Care Physician:		City:		
Facility:		State:		
Language:		County/Parish:		
Phone Area Code:		ZIP Code:		
Birth State:		District/Region:		
Birth Country:				
<b>Vaccination Defaults</b> <a href="#">click to update</a>				
Vaccinator:		Facility:		
District/Region:				
<b>Anatomical Injection Site Defaults</b> <a href="#">click to add</a>				
Vaccine Name:	Anatomical Site:	Min age	Max age	
<b>Lot Defaults</b> <a href="#">click to add</a>				
Vaccine Name:	Manufacturer / Lot Number / Facility / Pub Supp:			
<b>VIS Publication Date Defaults</b> <a href="#">click to add</a>				
Vaccine Name:	Pub Date1:	Pub Date2:	Pub Date3:	Pub Date4:
<b>User Preferences</b> <a href="#">click to update</a>				
Feature:			Status:	
Default Patient Search Version			Simple	
Automatic City / State / Zip / County Population			Enabled	
Use Arrow Navigation on Vaccination View/Add screen			Enabled	
Vaccine List Sort Order			Expiration Date	

2. In the Patient Defaults section, point and click on the "**click to update**" hyperlink. The "Patient Defaults Update" window appears.



Figure 8-2: Personal Settings / Patient Defaults

Patient Defaults Update		Cancel	Reset	Save
Primary Care Physician:	--select--			
Facility:	--select--			
Language:	--select--			
Birth Country:	--select--			
Birth State:	--select--			
City:				
State:	--select--			
ZIP Code:				
County/Parish:	--select--			
Phone Area Code:	( )			
District/Region:				

3. Point and click on the **drop-down arrows** to display a list of valid choices or type the data into the fields:

- Primary Care Physician
- Facility
- Language
- Birth Country
  - a) Mexico's postcode is 5 digits to the left of locality name (ex: 02860 MEXICO, D.F.)
  - b) Canada's provinces are 2 variable characters (ex: Montreal QC H3Z 2Y7)
- Birth State
- City
- State
- ZIP Code
- County/Parish
- Phone Area Code
- District/Region (must be a positive number)

**Note:** If a **Facility Display (Abbreviated) Name** was entered for the facility, it will appear in the list versus the full name of the facility.

4. Click one of the buttons:



- **CANCEL** – to NOT save and return to the "Personal Settings" window.
- **RESET** – to erase any newly entered text, redisplay the previous data, and remain on this window.
- **SAVE** – to save and return to the "Personal Settings" window.

## ADDING/UPDATING VACCINATION DEFAULTS

To add or update Vaccination Defaults, perform the following:

1. In the **Vaccination Defaults** section, point and click on the "**click to update**" hyperlink. The "Vaccination Defaults Update" window appears.

Figure 8-3: Vaccination Defaults Update

Vaccination Defaults Update	
Vaccinator:	--select-
Facility:	--select-
<div>Cancel Reset Save</div>	

2. Click on the drop-down arrows to display a list of valid choices for the following fields:
  - Vaccinator
  - Facility

**Note:** If a Facility Display (Abbreviated) Name was entered for the facility, it will appear in the list as opposed to the full name of the facility.

3. Click on one of the buttons:
  - **CANCEL** – to NOT save and return to the "Personal Settings" window.
  - **RESET** – to erase any newly entered text, redisplay previous date, and remain on this window.
  - **SAVE** – to save and return to the "Personal Settings" window.



## ADDING/UPDATING ANATOMICAL INJECTION DEFAULTS

The anatomical injection site for DTaP, MMR, IPV and Varicella can change depending on the age of the child. The default anatomical injection site defaults allow multiple anatomical site defaults depending on the patient's age. When this setting is entered, the injection site will display on the "Vaccination Add Details" based on the patient's age setup here.

To add or update Anatomical Injection Site Defaults, perform the following:

1. In the **Anatomical Injection Site Defaults** section, point and click on one of the hyperlinks:
  - **"click to add"** hyperlink when adding.
  - **"update"** when editing an existing setting.

The "Anatomical Injection Site Details Add/Update" window appears.

Figure 8-4: Anatomical Injection Site Defaults Add/Update

Anatomical Injection Site Defaults Add/Update	
<b>Vaccine Description:</b>	--select--
<b>Anatomical Injection Site:</b>	--select--
<b>Age Range:</b>	<input checked="" type="radio"/> All ages <input type="radio"/> Between <input type="text"/> and <input type="text"/> months <input type="radio"/> <input type="text"/> months and up
<div>Cancel Reset Save</div>	

2. In the **VACCINE DESCRIPTION** and **ANATOMICAL INJECTION SITE** fields, click on the **drop-down arrows** to display a list of valid choices.
  - For the vaccines DTaP, MMR, IPV, and Varicella, a multiple anatomical injection site has been added since the anatomical injection site changes depending on the age of the child. If a child is 15 months, the Anatomical Injection Site would be given in the thigh. If the child is 5 years old, it will be given in the arm.



3. In the **AGE RANGE** field, click on one of the radio buttons:
  - All Ages – to set the default for no minimum and maximum months; in other words, none.
  - Between (Minimum age) and (Maximum age) Months – to set the default for a specific minimum and maximum age.
    - a) If the minimum was 0 months and the maximum was 2 months, this covers the range until the child turns 2 months.
    - b) If the Maximum field isn't filled in, it will react as though you selected Minimum Months and Up.
  - (Minimum) Months and Up – to set a default for a specific number of months and older.
  - An error will appear if adding an age range that overlaps another age range already specified for the default setting of the same vaccine.
4. Click on one of the buttons:
  - **CANCEL** – to NOT save and return to the "Personal Settings" window.
  - **RESET** – to erase any newly entered text, redisplay previous data, and remain on this window.
  - **SAVE** – to save and return to the "Personal Settings" window.

**Note:** One vaccine name can be associated with one anatomical injection site at any given time.

## DELETING ANATOMICAL SITE DEFAULTS

Click on the **DELETE** hyperlink. The Vaccine and Anatomical Injection Site immediately deletes. The window does not open to another window.



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## ADDING/UPDATING LOT DEFAULTS

A "state configurable" option for a **Facility Inventory Manager** can be setup for a facility to allow facility-wide lot number defaults to be used. If a user does NOT have Lot Number defaults set up in their Personal Settings, the Inventory Manager's defaults will be used; however, if the user DOES have Lot Defaults setup in their Personal Settings, the Facility Inventory Manager's settings will not override them.

1. In the **Lot Defaults Add/Update** section, point and click one of the hyperlinks:
  - "click to add" hyperlink if you are adding a new Lot Default.
  - "update" if you are editing an existing Lot Default.

The "Lot Defaults Add/Update" window appears.

**Figure 8-5: Lot Defaults Add/Update**

Lot Defaults Add/Update	
Vaccine Description:	--select--
Manufacturer:	<input type="text"/> <a href="#">Click to select</a>
Lot Number:	<input type="text"/>
Lot Facility:	<input type="text"/>
Publicly Supplied:	<input type="checkbox"/>
<a href="#">Cancel</a> <a href="#">Reset</a> <a href="#">Add/Update Now</a>	

2. Click on the **drop-down arrow** to display a list of valid choices and make a selection for the **Vaccine Description**.
3. Click on the "**Click to Select**" hyperlink to display the "Select Lot Number" window with a list of valid choices.

**Note:** This list changes depending on the Vaccine chosen. In the window below, DTaP was the chosen Vaccine.



Figure 8-6: Select Lot Number

Select	Manufacturer	Lot Number	Facility	Pub. Supplied	Expiration Date	Doses Available
-->	ABBOT	B4	STC	Y	12/30/2005	100
-->	ABBOT	B1	STC	Y	01/01/2006	200

Cancel Clear

4. While on the "Select Lot Number" window, click on one of the buttons:
  - **SELECT ARROW** beside the Manufacturer you desire. You will return to the "Lot Defaults Add/Update" window with your selection imbedded into the corresponding field(s).
  - **CANCEL** to return to the "Lot Defaults Add/Update" window with your data remaining in the fields.
  - **CLEAR** to return to the "Lot Defaults Add/Update" window with the data fields erased.
5. While on the "Lot Defaults Add/Update" window, click on one of the buttons:
  - **CANCEL** to NOT save and return to the "Personal Settings" window.
  - **RESET** to erase any newly entered text, redisplay the previous data, and remain on this window.
  - **ADD/UPDATE NOW** to save and return to the "Personal Settings" window.

## DELETING LOT DEFAULTS

Locate the Lot whose defaults you want to delete, and click on the DELETE hyperlink. The Vaccine Name, Manufacturer, Lot Name, and Facility immediately delete. The window does not open to another window.



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## ADDING/UPDATING VIS PUBLICATION DATE DEFAULTS


The Vaccine Information Sheet (VIS) is a publication containing information regarding the immunization. Periodically, they are updated and reprinted, and are tracked within the application.

**Note:** The System Administrator can set up an IRMS VIS Publication Date Default that will automatically populate the VIS Publication Date fields within the application if this setting is not done by the user; however, if the user has set up this default it will override the System Administrator's setting(s).

1. In the VIS Publication Date Defaults section, point and click one of the hyperlinks:
  - "click to add" hyperlink when adding a new publication date.
  - "update" hyperlink when updating an existing setting.

The "VIS Publication Date Add/Update" window appears.

Figure 8-7: VIS Publication Date Defaults Add/Update

VIS Publication Date Defaults Add/Update	
<b>Vaccine Description:</b>	--select-- 
Publication Date 1:	<input type="text"/>
Publication Date 2:	<input type="text"/>
Publication Date 3:	<input type="text"/>
Publication Date 4:	<input type="text"/>
<div>Cancel Reset Save</div>	

2. Click on the drop-down arrow to display a list of valid choices for the **Vaccine Description**.
3. Type at least one Publication Date in the **Publication Date 1** field for each antigen of the vaccine. There are four fields for additional unique dates.
  - Dates two through four are primarily for composite shots.
4. Click on one of the buttons:
  - **CANCEL** – to NOT save and return to the "Personal Settings" window.



- **RESET** – to erase any newly entered text, redisplay previous data, and remain on this window.
- **SAVE** – to save and return to the "Personal Settings" window.

## UPDATING VIS PUBLICATION DATES

To update VIS Publication Dates, perform the following:

1. From the "Personal Settings" window, point and click on the **UPDATE** hyperlink next to the **VIS PUBLICATION DATE** you want to update. The "VIS Publication Date Defaults Add/Update" window appears. Refer to Figure 5:7 for an illustration of the window.
2. Make the necessary changes and click on one of the available buttons:
  - **CANCEL** – to NOT save and return to the "Personal Settings" window.
  - **RESET** – to erase any newly entered text, redisplay the previous data, and remain on this window.
  - **SAVE** – to save and return to the "Personal Settings" window.

## DELETING VIS PUBLICATION DATES

Locate the VIS Publication Date whose defaults you want to delete, and click on the **DELETE** hyperlink. The VIS Publication Date is immediately deleted. The window does not open to another window.

## USER PREFERENCES

This section is used to setup user preferences as default settings for the following:

- Type of "default" search to perform (simple or advanced)
- Enable or disable the automatic entry of City, State, Zip Code, and County fields allowing automatic population in all data entry window drop-down menus and/or fields.



- Enable/disable use of the Arrow Navigation keys on Vaccination View/Add" windows.
  - Set the order preference for the Vaccine List.
  - Default application.
1. From the "Personal Settings" window, point and click on the **CLICK TO UPDATE** hyperlink next to the **USER PREFERENCES** label. The "User Preferences Update" window appears.

Figure 8-8: User Preferences Update

User Preferences Update	
Default Patient Search Version:	Simple ▾
Automatic City / State / Zip / County Population:	<input checked="" type="checkbox"/>
Use Arrow Navigation on Vaccination View/Add screen:	<input checked="" type="checkbox"/>
Vaccine List Sort Order:	Expiration Date ▾
Default Application:	Standard ▾
<input type="button" value="Cancel"/> <input type="button" value="Reset"/> <input type="button" value="Save"/>	

2. Continue to the section below corresponding to the option you want to change/set.

## SETTING/UPDATING THE DEFAULT PATIENT SEARCH

There are two types of searches—Simple and Advanced. By using this feature, you can set the type of search that will be used as the default lookup for the Patient Search; however, this setting can be overridden directly on the "Patient Search" window.

If this setting isn't set here, the application assumes the Simple type.

To set the type of patient search default, perform the following:

1. Click the drop-down arrow and choose the desired option for the Default Search:
  - **Simple** – Uses any combination of: First Name or Initial, Last Name or Initial, Birth Date, WIC ID, SIIS Patient ID / Bar Code, Chart Number.
  - **Advanced** – Uses any combination of: First Name, Last Name, Birth Date, or First Name, Last Name, Birth Date, Guardian First Name, or Mother's Maiden Name, Street, City, State, Zip, Phone Number.



2. Click one of the available buttons:
  - **CANCEL** – to not save any newly changed entries.
  - **RESET**– to erase any newly typed entries from the fields.
  - **SAVE** – to save newly typed entries.

### ENABLING/DISABLING AUTOMATIC CITY, STATE, ZIP, COUNTY POPULATION

By enabling this setting, when a user accesses any window containing the City, State, Zip Code, or County fields, they will automatically populate.

To enable/disable the automatic population for **City**, **State**, **Zip code**, and **County** drop-down menus and/or fields, perform the following:

1. Point and click in the checkbox to Enable the automatic population of city, state, Zip code and county (located to the right of the field label).

**Note:** To disable the automatic population for City, State, and Zip Code, uncheck the checkbox.

2. Click one of the available buttons:
  - **CANCEL** – to NOT save any newly changed entries.
  - **RESET**– to erase any newly typed entries from the fields.
  - **SAVE** – to save newly typed entries and return to the "Personal Settings" window with your new changes displayed.

### ENABLING/DISABLING USE OF ARROW NAVIGATION KEYS ON VACCINATION VIEW/ADD

This setting is state-configurable and enables a user to use the keyboard's arrow keys to navigate around on the "Vaccination View/Add" windows.



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To enable/disable the use of Arrow Navigation keys (using the keyboard), perform the following:

1. Point and click in the checkbox to Enable the use of the Arrow Navigation Keys (located on your keyboard).

To disable the use of Arrow Navigation keys, uncheck the checkbox.

2. Click one of the available buttons:
  - **CANCEL** – to NOT save any newly changed entries.
  - **RESET** – to erase any newly typed selections from the fields.
  - **SAVE** – to save newly typed entries and return to the "Personal Settings" window with your new changes displayed.

## SETTING THE VACCINE SORT ORDER

This setting is used to setup the preferred order that vaccines will appear on the Lot Number List windows.

To select the **Vaccine Sort Order**, perform the following:

1. Click the drop-down arrow to view/select a valid choice. Valid choices are:
  - Facility Group, Facility
  - Facility
  - Expiration Date (default order; soonest date at the top)
  - Manufacturer (second order)
  - Lot Number (third order)
2. Click one of the available buttons:
  - **CANCEL** – to NOT save any newly changed entries.
  - **RESET** – to erase any newly typed selections from the fields.
  - **SAVE** – to save newly typed entries and return to the "Personal Settings" window with your new changes displayed.



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## SETTING THE DEFAULT APPLICATION

This option is used to setup a user's default application. To set the default application perform the following:

1. Click the drop-down menu arrow to view/select the default application. Examples are:
  - First Responder
  - Provider Recruitment
  - Standard (IWEB)
2. Click one of the available buttons:
  - **CANCEL** – to NOT save any newly changed entries.
  - **RESET** – to erase any newly typed selections from the fields.
  - **SAVE** – to save newly typed entries and return to the "Personal Settings" window with your new changes displayed.

## FORECAST SETTINGS

The Forecast Settings option is used to setup which vaccines should be forecasted for all patients and will appear throughout the application (Vaccination forecasts, Reports, etc.).

1. From the **SETTINGS** menu, point and click on the **FORECAST** option. The "Forecast Settings" window appears with each Vaccine Family listed.



Figure 8-9: Forecast Settings

Forecast Settings		
Vaccine Families marked as checked will be included in forecasts.		
	Vaccine Family	Include
	DTaP/DT/Td*	<input checked="" type="checkbox"/>
	HIB	<input checked="" type="checkbox"/>
	POLIO	<input checked="" type="checkbox"/>
	HEP-B 3 DOSE**	<input checked="" type="checkbox"/>
	MMR	<input checked="" type="checkbox"/>
	VARICELLA	<input checked="" type="checkbox"/>
	HEP-A	<input checked="" type="checkbox"/>
	FLU	<input checked="" type="checkbox"/>
	PNEUMO (PCV7)	<input checked="" type="checkbox"/>
	HEP-B 2 DOSE**	<input checked="" type="checkbox"/>

**Update Forecast**

\* DTaP or DT should be given to patients under 7 years old. Td should be given to patients 7 years old or older.  
 \*\* If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.

2. Point and click the checkbox under the Include column if you want to include the vaccine in all forecasting windows and reports.
3. Click the **UPDATE FORECAST** button, if you made changes. The window does not open to another window.

**Note:** If there are no changes, click on a different menu option to exit.

## HL7 UPLOAD SETTINGS

The HL7 Uploads option allows customization of the HL7 connection from one system to another. This customization may include the ability to change the following:

- Patient Identifier Type (MR/SR)
  - Incoming TCP/IP address
  - Default query order
  - Enforce User Agreement
1. From the "SETTINGS" menu, click the **HL7 UPLOADS** option. The "HL7 Settings" window appears.



Figure 8-10: HL7 Settings

HL7 Settings	
Incoming Account	CHRIS_IC
Application Type	STC-IWeb
Remote Registry Id Type:	MR
Local Registry Id Type:	SR
Newborn First Name Matcher:	
Accept If Not Older Than:	
Deduplicate:	<input checked="" type="checkbox"/>
Debug:	<input type="checkbox"/>
General Logging:	Minimal
Error Logging:	Verbose
Hash Id By Sender:	<input type="checkbox"/>
Filter Non-Consented:	<input type="checkbox"/>
Update Current Patients:	<input checked="" type="checkbox"/>
Strict Exact Match:	<input checked="" type="checkbox"/>
Query By:	<input checked="" type="checkbox"/> First, Last, Guardian First, and Mother Maiden Names <input checked="" type="checkbox"/> Birth Number <input checked="" type="checkbox"/> Medicaid <input checked="" type="checkbox"/> SSN <input checked="" type="checkbox"/> First Name, Last Name, Birth Date <input checked="" type="checkbox"/> First Name, Last Name (Exact) <input checked="" type="checkbox"/> First Name, Last Name (Phonetic) <input checked="" type="checkbox"/> Phone <input checked="" type="checkbox"/> First Initial, Last Initial, Birth Date <input type="checkbox"/> First Initial, Birth Date <input type="checkbox"/> Birth Date <input type="checkbox"/> First Name (Exact) <input type="checkbox"/> First Name (Phonetic) <input type="checkbox"/> Last Name (Phonetic)
Enforce User Agreement:	<input type="checkbox"/>

[Save](#)

2. The fields and their descriptions are listed in the table:

Figure 8-11: HL7 Settings Field Descriptions

FIELD	DESCRIPTION
<b>INCOMING ACCOUNT</b>	Username of the "incoming" user.



FIELD	DESCRIPTION
<b>APPLICATION TYPE</b>	Click the drop-down menu arrow to view/select a valid type.
<b>REMOTE REGISTRY ID TYPE</b>	MR abbreviated for Medical Record is the default. This is what the external system uses to identify its unique patient id.
<b>LOCAL REGISTRY ID TYPE</b>	SR abbreviated for State Registry ID and is the default. This is what STC uses to identify its unique SIIS patient id.
<b>NEWBORN FIRST NAME MATCHER</b>	Type the expression to be used to match the first name. The expression matches the first name of a newborn child who has not yet been named. Leave this blank if you don't understand what this is for.
<b>ACCEPT IF NOT OLDER THAN</b>	Type the Maximum age of patients accepted. All other patient update messages with patients older than the year given will be ignored.
<b>DEDUPLICATE</b>	This checkbox enables immediate deduplication for your IRMS after data import. Deduplication is a process that must occur before patient or vaccination information is inserted into the main registry database. During deduplication the new patient or vaccination information is matched and linked with any previously known information. Normally this process occurs nightly.
<b>DEBUG</b>	This checkbox enables the debugger which should only be used if you are experiencing problems.
<b>GENERAL LOGGING</b>	Click the drop-down menu arrow to view/select a valid choice. This setting is the level of logging for general purposes.
<b>ERROR LOGGING</b>	Click the drop-down menu arrow to view/select a valid choice. This setting is specifically for the level of error logging.
<b>HASH ID BY SENDER</b>	This checkbox flags the message reader to create a new Medical Record Number that is a combination of the Sending Facility and the given Medical Record Number.
<b>FILTER NON-CONSENTED</b>	This checkbox enables the "non-consented" filter to be used.
<b>UPDATE CURRENT PATIENTS</b>	This checkbox is used to enable the updating of current patients.



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FIELD	DESCRIPTION
<b>STRICT EXACT MATCH</b>	This checkbox enables strictly exact matches.
<b>QUERY BY</b>	There are various checkboxes to order the query by. Click all that apply.
<b>ENFORCE USER AGREEMENT</b>	Enables the enforcement of a User Agreement. The user must first accept the User Agreement in order to use the query.

3. Click the **SAVE** button when finished entering the settings.



## 9 PATIENT MENU

The purpose of the Patient Menu is to **SEARCH** and **ADD PATIENTS**, as well as view their **DEMOGRAPHICS**. The Demographics option will become available (displays in bold versus gray) after a Search has been performed.

For viewers, the menu will display **Search**, and for clients, the menu will display **Search/Add**.

Regardless of whether you are editing, viewing, or adding a new patient, a **SEARCH** is always performed first.

### PATIENT RECORD ELEMENTS / PUBLIC & PRIVATE DATA

**Public** information is registry-wide information and can be viewed by every user access type, **excluding Vendor View**.

**Private** information is confidential information and can be viewed only by the "owner." This excludes **Registry View** and **Vendor View**.

**Note:** You are only given access to view private information when the information originates within your IRMS.

**Registry Clients, IRMS Clients** and **Facility Clients** are the users that are able to add/modify patients.

### PATIENT RECORD ELEMENTS

A patient record consists of two major elements each containing public and private data fields:

- Demographics (public and private)
- Vaccinations (public and private)



The field names shown in the next two tables indicate whether the field is public versus private.

## DEMOGRAPHICS

Demographics consist of patient, address, family, and miscellaneous data. The table details the Patient Demographic fields and the type of field (public or private).

**Table 9-1: Patient Demographics Elements**

Patient Demographics			
Patient			
First Name or Alias:	Public	Race:	Private
Middle Name:	Public	Ethnicity:	Private
Last Name or Alias:	Public	Language:	Private
Suffix:	Public	Medicaid:	Private
Birth Date:	Public	Birth File:	Private
SSN:	Private	VFC Status:	Private
Gender:	Public	Inactive:	Public
Age:	Public		
Multiple Birth	Public		
Address			
Street:	Private	Physical Address:	Private
City:	Private	State:	Private
Country:	Private	County/Parish:	Private
ZIP Code:	Private	District/Region:	Private
Phone Number and Extension	Private	Valid Address	Private
Email:	Private	Block Health Promotion Reason	Private
School:	Private		
Family			
Grdn 1 First Nm:	Public	Grdn 1 SSN:	Private
Grdn 1 Middle Nm:	Public	Grdn 2 First Nm:	Public



Patient Demographics			
Grdn 1 Last Nm:	Public	Grdn 2 Last Nm:	Public
Mother Maiden Nm:	Private	Grdn Work Phone:	Private
Other Info			
Physician:	Public	Health Plan Name:	Public
Facility:	Public	HP Patient ID:	Private
Chart Number:	Private	HP Enroll Date:	Private
Next Appt. Date:	Private	Birth State:	Private
Block Recall:	Private	Birth Country:	Private
Recall Count:	Public	Allergies/Comments:	Private
Program/Mem.IDs:	Public	Number in Family:	Public
Monthly Income:	Private		
Record Info			
SIIS Patient ID:	Private	IRMS Owner	Public
Entry Date:	Public	Last Update:	Public

## VACCINATIONS

The Vaccinations element is self-explanatory. The table contains the fields associated with a patient's vaccinations.



Table 9-2: Patient Vaccination Elements

VACCINATIONS			
<b>Note:</b> Regardless of patient record ownership, the user will always see every individual vaccination.			
Vaccination Detail			
Vaccine:	Public		
Date Administered:	Public		
Historical:	Public		
Manufacturer:	Private		
Lot Number:	Public		
Lot Facility:	Private		
Vaccinator:	Public		
Publicly Supplied:	(Y) Public (N) Private		
Facility:	Public		
Anatomical Site:	Public		
VFC Status:	Private		
Adverse Reaction:	Private		
District/Region:	Private		
Dates of VIS Publications:	Public		
Date VIS Form Given:	Public		

## OWNERSHIP OF PATIENT RECORDS

Ownership is a privilege that is initially set up by the Administrator specifically for an IRMS.

Records can be owned by:

- An IRMS
- A Primary Care Facility
- A Primary Care Physician



When a Facility or Physician is the owner of a record, it is a combination of IRMS/Facility and IRMS/Physician.

Ownership is identified by the values in the Patient Demographic record; specifically:

- An IRMS
- A Primary Care Facility
- A Primary Care Physician

These fields are populated in two ways:

If they are manually edited on the patient demographics window, or an administered vaccination is added by an entity that is allowed to own records (or does not have ownership blocked).

## OWNERSHIP RESTRICTIONS

Depending on how your state is configured, it may be appropriate to block ownership for entities such as schools, emergency rooms, and specialized clinics that won't be handling any patient management such as reminder recall.

Vaccination date is used to determine ownership versus registry entry date.

**Note:** If the “Do not take ownership of this record” checkbox is checked on the “Patient Demographics Edit” or on the “Vaccination View/Add” window, then the ownership of the patient record remains with the previous owning IRMS and is not changed to the IRMS making the edit or adding the shot(s).



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## PATIENT SEARCH & ADD INFORMATION

There are two types of searches—**Simple** or **Advanced**. **Simple searches** are most frequently used by application View(ers).

The system administrator sets up a default search type when your User-ID is created; however, you can change this default using the **SETTINGS** option, or you can override the setting directly on the “Patient Search” window to use both types of searches.

Both "search types" will try to locate an **EXACT** match unless you use one of the wildcard characters with your entry. The wildcard characters (%) and (\_) and their differences are:

- **Percent (%)** – Useful when you are unsure how a **name** is spelled. The percent sign is used to indicate multiple letters.

For example: We are unsure if the name is Janet or Janice. We could enter Jan% for the first name and click on the SEARCH button to locate all names that begin with JAN.

- **Underscore (\_)** – Useful when you are unsure how a **name** is spelled, but know it is a single letter.

For example: We are unsure if the name is Diane or Diana. We could enter Dian\_ for the first name and click on the SEARCH button to locate all names that begin with DIAN.

- When using initials in the **FIRST NAME** and **LAST NAME** fields, do not use the wildcard characters.

The results of the search will position in the bottom half of the window along with the search criteria. The total results that can be returned are 250 records. If there are more than 250 records, a message will appear indicating to limit your search by adding additional search criteria.

A patient can be added from both the Simple and Advanced windows; however, the windows behave differently and will be described. Continue to the section that corresponds to the type of Search being used (Simple or Advanced).



## SIMPLE PATIENT SEARCH/ADD

Previous search results will appear on the window upon opening, if a search was done.

The more criteria that you can enter, the fewer returned results.

**Note:** If necessary, click on the "**Click here to use the 'advanced' search**" hyperlink. The (advanced) "Patient Search" window appears. Continue to the section titled, "Advanced Patient Search/Add."

To perform a **SIMPLE SEARCH**, follow these steps:

1. From the **PATIENT** menu, point and click on the **SEARCH/ADD** option. The Simple "Patient Search" window appears.

Figure 9-1: Simple Patient Search

Patient Search							
Click <a href="#">here</a> to use the 'advanced' search							
First Name or Initial:	John	WIC ID:					
Last Name or Initial:		SIIS Patient ID / Bar Code:					
Birth Date:		Chart Number:					
		ACS Key Line:					
Family and Address Information:							
Guardian First Name:		Mother's Maiden Name:					
Street:	<input type="radio"/> P.O. Box:	<input type="radio"/> Street:					
City:		State:	--select--				
ZIP Code:		Phone Number:					
<input type="checkbox"/> Check here if adding a new patient.							
<div>Add Anonymous Clear Reset Search</div>							
Note: When searching by First and/or Last Name, you may use % or _ as wildcard characters.							
Patient Search Results							
Records Found = 3		Search Criteria: First Name (Exact)					
Select	First Name	Middle Name	Last Name	Birth Date	SIIS Patient ID	Grd First Name	Grd Last Name
-->	JOHN		DOE	01/01/2001	1	MARY	
-->	JOHN		DOE	01/01/2000	4	MARY	
-->	JOHN		SMITH	01/01/1930	3	MARY	
<div>Report Duplicates</div>							



- To switch from the **Simple** search to **Advanced**, click on the "Click here to use the "advanced" search" hyperlink. Refer to the Advanced Search section for instructions.

2. The fields and buttons are described in the table below.

Table 9-3: Simple and Advanced Patient Search Fields

SIMPLE FIELD	ADVANCED FIELD	DESCRIPTION
FIRST NAME OR INITIAL	FIRST NAME	Name, alias, or initial of the patient's first name. The following can also be used as a First Name: <ul style="list-style-type: none"> <li>• NEWBORN</li> <li>• BABY</li> <li>• BABY BOY</li> <li>• BABY GIRL</li> </ul> <b>Note:</b> When using an <b>initial</b> , do not use the wildcard characters; however, you can use the wildcard characters when using <b>names</b> . <b>Alias</b> information is state configurable, so it may not appear on your window.
	MIDDLE NAME	Middle name of the patient.
LAST NAME OR INITIAL	LAST NAME	Name, alias, or initial of the patient's last name. <b>Note:</b> When using an <b>initial</b> , do not use the wildcard characters; however, you can use the wildcard characters when using <b>names</b> . <b>Alias</b> information is state configurable, so it may not appear on your window.
BIRTH DATE	BIRTH DATE	Patient's Date of birth.
WIC ID	WIC ID	Women of Infant Children Identification number.



SIMPLE FIELD	ADVANCED FIELD	DESCRIPTION
SIIS PATIENT ID/BAR CODE	SIIS PATIENT ID/BAR CODE	State Immunization Information System Patient Identification number or Bar Code.
	BIRTH FILE NUMBER	A unique number associated with the Birth File for the patient.
	MEDICAID NUMBER	A unique number associated with Medicaid for the patient.
CHART NUMBER	CHART NUMBER	Patient's medical chart identification number.
GUARDIAN FIRST NAME	GUARDIAN FIRST NAME	Patient's guardian's first name.
MOTHER'S MAIDEN NAME	MOTHER'S MAIDEN NAME (LAST NAME ONLY)	Patient's mother's maiden name.
STREET PO BOX OR STREET ADDRESS	STREET PO BOX OR STREET ADDRESS	<p>Patient's Post Office Box number or street address. The following abbreviations can be used:</p> <ul style="list-style-type: none"> <li>Box (Bx)</li> <li>Highway (Hwy)</li> <li>Center (Ctr)</li> <li>Expressway (Expy)</li> <li>Heights (Hts)</li> <li>Junction (Jct)</li> <li>Lake (Lk)</li> <li>Square (Sq)</li> <li>Station (Sta)</li> <li>Northwest, Northeast, Southwest, Southeast (Currently only supported when there is a space between the words)</li> <li>Lot (used in context of apartment or space #)</li> </ul>



SIMPLE FIELD	ADVANCED FIELD	DESCRIPTION
		<ul style="list-style-type: none"> <li>Martin Luther King (Martin L King, MLK)</li> </ul>
CITY	CITY	Patient's City name of residence.
STATE	STATE	Patient's State name of residence.
ZIP CODE	ZIP CODE	Patient's Zip Code of residence.
PHONE NUMBER	PHONE NUMBER	Patient's telephone number.
CHECK HERE IF ADDING NEW PATIENT		<p>Checkbox to indicate whether you will be adding a name of a new patient. When checked, the fields that are required will be highlighted in red.</p> <p>Refer to the section titled, "Adding a New Patient" for more information.</p>

3. Type the search criteria into the corresponding fields using any of these field combinations.

**Note:** The Search order or field priority is as follows:

- Edit/View (First Name, Last Name, (alias) Birth Date, one family field, one address field)
- SIIS Patient ID (dedicated section below)
- Program ID (i.e., WIC ID; configurable by the state administrator)
- Chart Number
- First Initial/Birth Date (also includes alias. See note below)
- Last Initial/Birth Date (also includes alias. See note below)
- Birth Date



- First Name/Last Name
- First Name (also includes alias)
- Last Name (also includes alias)
- Phone Number

**Note:** When using initials, you must use the % wildcard character; otherwise, the search will look for an EXACT match versus a LIKE match. An example search for patients named Bob with a specific birth date would be to type the first name of BOB in the First Name field, and then click and type the birth date using the format MMDDYYYY in the BIRTH DATE field.

**4.** Click on one of the available buttons:

- **ADD ANONYMOUS** – (State configurable button)  
Allows a patient to be added with "minimal demographics" information. Birth date must be entered and optionally VFC Status, Medicaid Number, and Inactive status can be entered. After an anonymous patient is added, the "Patient Demographics" window appears with the First Name and Last Name as Anonymousxx (where xx represents a sequential number). Refer to the section titled, "Anonymous Patient Search/Add."
- **CLEAR ALL** – Erases any newly typed text from all fields. Only the input fields will clear—the previous search criteria will remain on the window.
- **RESET VALUES** – Repopulates the fields to what they were before the **CLEAR ALL** button was pressed.
- **SELECT ARROW** – to select an existing patient and display their "Patient Demographics" window. Continue to the section titled, "Editing a Patient."
- **REPORT DUPLICATES** – to identify patient records that appear to be duplicates. Continue the section titled, "Reporting Duplicates." This is a "state configurable" option.



- **SEARCH** (or the **ENTER** key) – Begins to locate the results for the search criteria entered and displays them in the "Patient Search Results" section of the window. Depending on whether a match is found or not, the "Patient Search Results" window appears with record results or without.
  - a) If a **match is found based on the criteria entered**, the "Patient Search Results" appear in the bottom half of the window. Continue to the next step. (In this example, three records were located.)

Figure 9-2: Simple Patient Search with Results and Duplicates Button

Patient Search						Click <a href="#">here</a> to use the 'advanced' search	
First Name or Initial:	<input type="text" value="John"/>	WIC ID:	<input type="text"/>				
Last Name or Initial:	<input type="text"/>	SIIS Patient ID / Bar Code:	<input type="text"/>				
Birth Date:	<input type="text"/>	Chart Number:	<input type="text"/>				
		ACS Key Line:	<input type="text"/>				
Family and Address Information:							
Guardian First Name:	<input type="text"/>	Mother's Maiden Name:	<input type="text"/>				
Street:	<input type="text"/>	<input type="radio"/> P.O. Box:	<input type="text"/>	<input checked="" type="radio"/> Street:	<input type="text"/>		
City:	<input type="text"/>	State:	<input type="text" value="--select--"/>				
ZIP Code:	<input type="text"/>	Phone Number:	<input type="text"/>				
<input type="checkbox"/> Check here if adding a new patient.							
				<b>Add Anonymous</b>	<b>Clear</b>	<b>Reset</b>	<b>Search</b>
Note: When searching by First and/or Last Name, you may use % or _ as wildcard characters.							
Patient Search Results							
Records Found = 3		Search Criteria: First Name (Exact)					
Select	First Name	Middle Name	Last Name	Birth Date	SIIS Patient ID	Grd First Name	Grd Last Name
<input type="checkbox"/>	JOHN		DOE	01/01/2001	1	MARY	
<input type="checkbox"/>	JOHN		DOE	01/01/2002	4	MARY	
<input type="checkbox"/>	JOHN		SMITH	01/01/1930	3	MARY	
							<b>Report Duplicates</b>

- b) If a **match IS NOT found**, you are ready to add the patient. Continue to the next section titled, "Adding a Patient (Simple Method)."



## REPORTING DUPLICATES

This button is a “state configurable” option that is useful to identify and report patient records that appear to be duplicates to the System Administrator.

1. From the “Patient Search” window, click the **REPORT DUPLICATES** button. The “Report Duplicate Patients” window appears.

Figure 9-3: Report Duplicate Patients

Report Duplicate Patients							
Reason for deduplication:						--select--	
Please select two or more records you would like to merge.							
Select	First Name	Middle Name	Last Name	Birth Date	SIIS Patient ID	Grd First Name	Grd Last Name
<input type="checkbox"/>	JOHN		DOE	01/01/2001	1	MARY	
<input type="checkbox"/>	JOHN		DOE	01/01/2000	4	MARY	
<input type="checkbox"/>	JOHN		SMITH	01/01/1930	3	MARY	
						Back	Report Duplicates

2. Click the drop-down menu arrow to view/select a valid reason for the deduplication. These reasons are created by the System Administrator and will populate the drop-down menu field.
3. Select two or more records that you want to merge by clicking the checkbox.
4. Click one of the available buttons:
  - **BACK** – to return to the “Patient Search Results” window without reporting the duplicates.
  - **REPORT DUPLICATES** – to continue to the “Patient Set Merge” window to indicate the record to merge the records with.



Figure 9-4: Patient Set Merge

Patient Set Merge		
Master Patient:	<input type="radio"/>	<input type="radio"/>
SIIS ID	1	4
First Name	JOHN	JOHN
Middle Name		
Last Name	DOE	DOE
Suffix		
Birth Date	01/01/2001	01/01/2000
Gender	MALE	
SSN	123-45-8520	
Medicaid Number	951753	
Birth File	35745681	
Race	White	White
Language	ENGLISH	
Mother Maiden Name		
Guardian First Name	MARY	MARY
Guardian Middle Name		
Guardian Last Name		
Guardian SSN		
Street Address	PO BOX 4455	
City	GLENDALE	
State	ARIZONA	
Zip Code	85304	
Phone	(602)241-1502	(602)241-1111
Email	SOMEONE@SOMEWHERE.COM	
Health Plan		
Health Plan ID		
HP Enroll Date		
Birth Order		
Birth Count		

Reason for deduplication: TEST

Testing for Duplicates

5. At the top of the window there is a field labeled **MASTER PATIENT** with radio buttons. Click on the radio button that you want to merge the record with.
6. Directly above the buttons is a field to type any “directive” **comments** regarding the merge.
7. Click one of the available buttons:
  - **BACK** – to return to the “Report Duplicate Patients” window without performing a merge.
  - **MERGE** – to merge the displayed records to the “selected” master patient.



## ADDING A PATIENT (SIMPLE METHOD)

A patient can be added after a Search has been performed and a match is not found.

1. Click the "**Check here if adding a new patient**" checkbox (circled in the figure below).

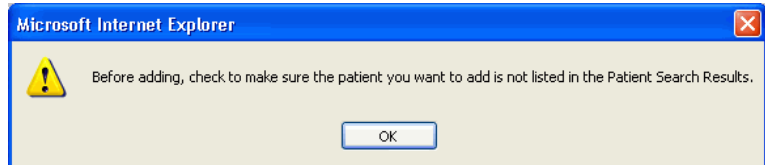
Figure 9-5: Adding a Patient – Simple Method

Patient Search		Click <a href="#">here</a> to use the 'advanced' search	
First Name or Initial:	<input type="text" value="Sherri"/>	WIC ID:	<input type="text"/>
Last Name or Initial:	<input type="text" value="Smith"/>	SIIS Patient ID / Bar Code:	<input type="text"/>
Birth Date:	<input type="text"/>	Chart Number:	<input type="text"/>
		ACS Key Line:	<input type="text"/>
Family and Address Information:			
Guardian First Name:	<input type="text"/>	Mother's Maiden Name:	<input type="text"/>
Street:	<input type="radio"/> P.O. Box: <input type="text"/>	<input checked="" type="radio"/> Street:	<input type="text"/>
City:	<input type="text"/>	State:	--select-- <input type="button" value="v"/>
ZIP Code:	<input type="text"/>	Phone Number:	<input type="text"/>
<input type="checkbox"/> Check here if adding a new patient.			
<input type="button" value="Add Anonymous"/>		<input type="button" value="Clear"/>	<input type="button" value="Reset"/>
<input type="button" value="Search"/>			
Note: When searching by First and/or Last Name, you may use % or _ as wildcard characters.			
Patient Search Results			
Records Found = 0		Search Criteria: First Name / Last Name (Exact)	
Select	First Name	Middle Name	Last Name
Birth Date	SIIS Patient ID	Grd First Name	Grd Last Name

2. At a minimum, type the "**RED** labeled" fields. The recommended fields are:
  - First Name, Last Name, Birth Date
  - Guardian FN or Mother's Maiden Name
  - (Complete) Address or Phone Number.
3. Click the **SEARCH** button again. A "Warning Dialog Box" appears asking you to verify the patient doesn't already exist.



Figure 9-6: Warning Dialog Box – Adding Patient



4. Click the **OK** button. The “Patient Search” window reappears with another message (in green) stating to check the “Search Results” area again to verify non-existence, along with the **ADD PATIENT** button.
5. Click the **ADD PATIENT** button. The “Patient Add” window appears.



## Patient Menu

Figure 9-7: Patient Add

Patient Add			
First Name:	Sherri	Race:	White Black or African American
Middle Name:		Ethnicity:	--select--
Last Name:	Smith	Language:	--select--
Suffix:	--none--	SSN:	
Birth Date:	06/03/2000	Medicaid #:	
Gender:	--select--	Birth File #:	
Birth Order:		VFC Status:	--select--
Multiple Birth Count:		Inactive:	--select--
		Medicare #:	
Address			
Street:	<input type="radio"/> P.O. Box: <input type="text"/> Physical Address: <input type="text"/>		
	<input checked="" type="radio"/> Street: <input type="text"/>		
Country:	United States		
City:			
State:	--select--	ZIP Code:	
County/Parish:	--select--	District/Region:	
Phone Number:	(602)241-1555	Extension:	
Email:			
School:	<input type="text"/> <a href="#">Click to select</a>		
Family			
Guardian 1 First:	Dean	Guardian 1 SSN:	
Guardian 1 Middle:		Guardian 2 First:	
Guardian 1 Last:		Guardian 2 Last:	
Mother Maiden:		Guardian Work Phone:	
Other Info			
Health Plan Name:	--select--		
HP Patient ID:		HP Enroll Date:	
Physician:	--select--		
Facility:	--select--		
Next Appt. Date:		Chart Number:	
Birth Country:	United States		
Birth State:	--select--		
Block Recall:	<input type="checkbox"/>		
Allergies:	<input type="text"/>		
Comments:	<input type="text"/>		
Monthly Income:			
Number in Family:			
<input type="button" value="Cancel"/> <input type="button" value="Reset"/> <input type="button" value="Add Patient"/>			

6. The fields and descriptions are listed in the table below.



Table 9-4: Patient Add/Edit &amp; Demographic Field Descriptions

FIELD	DESCRIPTION
<b>PATIENT</b>	
<b>FIRST NAME</b>	<p>Patient's first name. The following can also be used as a First Name:</p> <ul style="list-style-type: none"> <li>• NEWBORN</li> <li>• BABY</li> <li>• BABY BOY</li> <li>• BABY GIRL</li> </ul>
<b>MIDDLE NAME</b>	Patient's middle name.
<b>LAST NAME</b>	Patient's last name.
<b>SUFFIX</b>	Extension of the patient's name. For example: Jr., Sr., IV, etc. Click on the drop-down arrow to select a valid choice.
<b>BIRTH DATE</b>	Date of birth of the patient.
<b>GENDER</b>	Sex of the patient. Click on the drop-down arrow to select a valid choice.
<b>BIRTH ORDER</b>	<p>This field is used when adding twins, triplets, etc. This is the birth order of the patient you are adding. This must be a single whole number. For example, when entering twins, the Birth Order would be 1 or 2 and when combined with the Multiple Birth Count field, the end result would be 1 of 2, 2 of 2, etc.</p> <p>A confirmation dialog box appears to confirm that you are entering "multiple births." Click the OK button.</p> <p><b>Note:</b> The Birth Order field and Multiple Birth Count fields are "merged" on the Patient Demographics window. The field is labeled, <b>Multiple Birth</b> (e.g., 1 of 2). The first number is the Birth Order and the second number is the Multiple Birth Count number.</p> <p>After the Birth Order has been entered/saved, only a Registry Client can edit the field.</p>



FIELD	DESCRIPTION
<b>MULTIPLE BIRTH COUNT</b>	<p>This field is used in conjunction with the BIRTH ORDER field. This is the number of the total patients within the multiple births. For example when entering twins, the Birth Order would be 1 or 2 and when combines with the Multiple Birth Count field, the end result would be 1 of 2, 2 of 2, etc.</p> <p><b>Note:</b> The Birth Order field and Multiple Birth Count fields are "merged" on the Patient Demographics window. The field is labeled, <b>Multiple Birth</b> (e.g., 1 of 2). The first number is the Birth Order and the second number is the Multiple Birth Count number.</p> <p>After the Multiple Birth Count has been entered/saved, only a Registry Client can edit the field.</p>
<b>RACE</b>	<p>Race of the patient. Click on the drop-down arrow to select a valid choice. (Required in some states.)</p>
<b>ETHNICITY</b>	<p>Ethnic of the patient. Click on the drop-down arrow to select a valid choice. (Required in some states.)</p>
<b>LANGUAGE</b>	<p>Language of the patient. Click on the drop-down arrow to select a valid choice.</p>
<b>SSN</b>	<p>Social Security Number of the patient.</p>
<b>MEDICAID #</b>	<p>A unique number associated with Medicaid for the patient.</p>
<b>BIRTH FILE #</b>	<p>A unique number associated with the Birth File for the patient.</p>
<b>VFC STATUS</b>	<p>Vaccines for Children Status. Click on the drop-down arrow to select a valid choice. (Required in some states.)</p>



FIELD	DESCRIPTION
<b>INACTIVE</b>	<p>Inactivates the patient's record. A drop-down list is available to select the appropriate reason. Examples are:</p> <ul style="list-style-type: none"> <li>• Moved or gone elsewhere</li> <li>• Deceased</li> <li>• Moved Out of State</li> </ul> <p><b>Note:</b> If this field is flagged as DECEASED, only a user with Registry Client Access can change the status.</p>
<b>MEDICARE #</b>	A unique number associated with Medicare for the patient.
<b>ALIAS (State Configurable)</b>	
<b>FIRST NAME</b>	<p>(State configurable)</p> <p>Another first name the patient may have used.</p> <p><b>Note:</b> When a search is performed using first or last name, the alias fields are also included.</p>
<b>LAST NAME</b>	<p>(State configurable)</p> <p>Another last name the patient may have used.</p> <p><b>Note:</b> When a search is performed using first or last name, the alias fields are also included.</p>
<b>ADDRESS</b>	
<b>STREET</b>	<p>Street is state configurable and may not be a required entry for your state.</p> <p><b>PO BOX or PHYSICAL ADDRESS</b> can be entered. They can be used separately, or together.</p> <p><b>STREET</b> – If there isn't a PO BOX, a normal street address should be entered, if it wasn't entered initially from the original Search window.</p> <p>May require one of the following for address validation:</p> <ul style="list-style-type: none"> <li>• Street Address and City</li> <li>• Street Address and Zip Code</li> </ul>



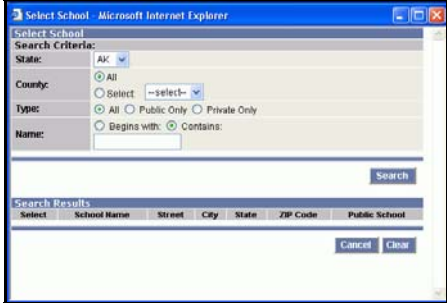
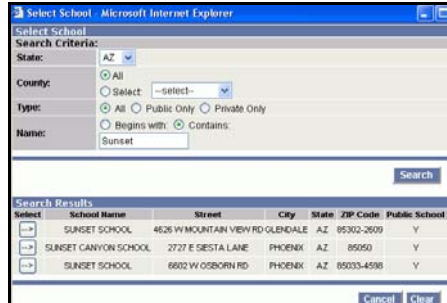
FIELD	DESCRIPTION
	<ul style="list-style-type: none"><li>• Phone Number</li></ul> <p>The following abbreviations can be used:</p> <ul style="list-style-type: none"><li>• Box (Bx)</li><li>• Highway (Hwy)</li><li>• Center (Ctr)</li><li>• Expressway (Expy)</li><li>• Heights (Hts)</li><li>• Junction (Jct)</li><li>• Lake (Lk)</li><li>• Square (Sq)</li><li>• Station (Sta)</li><li>• Northwest, Northeast, Southwest, Southeast (Currently only supported when there is a space between the words)</li><li>• Lot (used in context of apartment or space #)</li><li>• Martin Luther King (Martin L King, MLK)</li></ul>
<b>COUNTRY</b>	Country where patient lives. Click on the drop-down arrow to view the list. United States is the default.
<b>CITY</b>	City name where the patient lives. This may automatically fill if set in the Personal Settings.
<b>STATE</b>	<p>State abbreviation where the patient lives. The State list will populate depending on the Country entered.</p> <p>Click on the drop-down arrow to select a valid choice. This may automatically fill if set in the Personal Settings.</p> <p><b>Note:</b> State must be filled in before selecting the County.</p>
<b>ZIP CODE</b>	Zip code where the patient lives. This may automatically fill if set in the Personal Settings.



FIELD	DESCRIPTION
COUNTY/PARISH	County where the patient lives. <b>Note:</b> State must be filled in before selecting the County. Click on the drop-down arrow to select a valid choice. This may automatically fill if set in the Personal Settings.
DISTRICT/ REGION	District or Region where the patient lives. This may automatically fill if set in the Personal Settings.
VALID ADDRESS (WASHINGTON ONLY)	(State configurable) Whether or not the patient's address is valid. If the patient's address is not valid, mailings will not be attempted.
BLOCK HEALTH PROMOTION REASON (WASHINGTON ONLY)	(State configurable) Reason explaining why Health Promotion mailings should not be sent.
PHONE NUMBER	(State configurable) This field is state configurable and may not be a required entry for your state. Telephone number for the patient. The "area code" portion of the phone number may automatically fill if set in the Personal Settings. May require one of the following for address validation: <ul style="list-style-type: none"><li>• Street Address and City</li><li>• Street Address and Zip Code</li><li>• Phone Number</li></ul>
EXTENSION	Extension number for the patient. If an extension number is entered, it will be appended with the <b>Phone Number</b> on the Demographics window.
EMAIL	Electronic mail address for the patient to receive Reminder/Recall notices.
SCHOOL	Name of the school the patient attends. Click on the hyperlink labeled "Click to Select" for all the schools in your State. The "Select School" window appears.



## Patient Menu

FIELD	DESCRIPTION
	<div></div> <p>Perform the following actions on this window:</p> <ul style="list-style-type: none"><li>• <b>STATE</b> -- Select the appropriate STATE by clicking on the drop-down.</li><li>• <b>COUNTY</b> – The ALL radio button is chosen by default; however, click the drop-down arrow to select the specific county. The SELECT radio button will then get automatically selected.</li><li>• <b>TYPE</b> (of school)–<b>ALL</b> (for both public and private); or <b>PUBLIC ONLY</b>; or <b>PRIVATE ONLY</b> (for a list of private schools).</li><li>• <b>NAME</b> -- Select <b>BEGINS WITH</b> or <b>CONTAINS</b> and type the name (or partial name) of the school.</li><li>• Press the <b>SEARCH</b> button. The "Search Results" appear.</li></ul> <div></div> <ul style="list-style-type: none"><li>• Click on the <b>SELECT ARROW</b></li></ul>



FIELD	DESCRIPTION
	to choose a school—the school will automatically copy into the School field; or click <b>CLEAR</b> to erase and type a different name; or click on <b>CANCEL</b> to exit and not make a selection.
<b>FAMILY</b>	
<b>GUARDIAN 1 FIRST</b>	Family fields are state configurable and may not be a required entry for your state. First name of the patient's first guardian. May require one of the following for family validation: <ul style="list-style-type: none"> <li>Guardian First Name</li> <li>Mother Maiden Name</li> <li>Guardian SSN</li> </ul>
<b>GUARDIAN 1 MIDDLE</b>	Middle name of the patient's first guardian.
<b>GUARDIAN 1 LAST</b>	Last name of the patient's first guardian.
<b>MOTHER MAIDEN</b>	Family fields are state configurable and may not be a required entry for your state. Maiden name (birth-given last name) of the patient's mother. May require one of the following for family validation: <ul style="list-style-type: none"> <li>Guardian First Name</li> <li>Mother Maiden Name</li> <li>Guardian SSN</li> </ul>
<b>GUARDIAN 1 SSN</b>	Family fields are state configurable and may not be a required entry for your state. Social security number of the patient's first guardian. May require one of the following for family validation: <ul style="list-style-type: none"> <li>Guardian First Name</li> <li>Mother Maiden Name</li> <li>Guardian SSN</li> </ul>
<b>GUARDIAN 2 FIRST</b>	First name of the patient's second



FIELD	DESCRIPTION
	guardian.
<b>GUARDIAN 2 LAST</b>	Last name of the patient's second guardian.
<b>GUARDIAN WORK PHONE</b>	Phone number of the patient's first guardian.
<b>OTHER INFO</b>	
<b>HEALTH PLAN NAME</b>	Name of the health insurance plan the patient is on. Click on the drop-down for a list of valid choices and make a selection.
<b>HP PATIENT ID</b>	Identifying patient number of the Health Plan.
<b>HP ENROLL DATE</b>	Effective date for Health Plan enrollment.
<b>PHYSICIAN</b>	Name of the patient's primary care physician. This may automatically fill if set in the Personal Settings. Click on the drop-down for a list of valid choices.
<b>FACILITY</b>	Name of the Facility the patient visits. This can automatically fill if set in your Personal Settings. A drop-down list is available containing a list of valid choices. <b>Note:</b> If a Facility Display (Abbreviated) Name was entered for the facility, it will appear in the list as opposed to the full name of the facility.
<b>NEXT APPT DATE</b>	Date of the patient's next appointment. This date is used in Reminder/Recall.
<b>CHART NUMBER</b>	A unique identifying number for the patient's chart.
<b>BIRTH COUNTRY</b>	Country name where the patient was born.
<b>BIRTH STATE</b>	State the patient was born in. Click on the drop-down for a list of valid choices.
<b>BLOCK RECALL</b>	If this box is checked, it indicates the patient will be blocked from REMINDER RECALL.
<b>RECALL COUNT ATTEMPTS</b>	The number of times the patient has been sent a REMINDER RECALL. The system generates this number and displays it on the Demographics window.



FIELD	DESCRIPTION
<b>ALLERGIES</b>	Any noted allergies for the patient.
<b>COMMENTS</b>	Any additional comments about the patient.
<b>HIGH RISK (STATE CONFIGURABLE)</b>	<p>High Risk Categories are added at the state level. These categories will make it easier to identify patients that may have special immunization needs.</p> <p>If this field is highlighted in red, this patient has a high risk entry, (s)he may have special immunization needs. More information is available in the section titled, "Demographics (Regular).</p>
<b>MONTHLY INCOME</b>	Monthly gross income of the patient's family.
<b>NUMBER IN FAMILY</b>	Total number of family members.
<b>RECORD INFO (APPEARS ON THE DEMOGRAPHICS WINDOW AFTER A PATIENT IS ADDED)</b>	
<b>SIIS PATIENT ID</b>	State Immunization Information System (SIIS) Patient Identifying Number.
<b>ENTRY DATE</b>	Date the patient was entered into the application.
<b>IRMS OWNER</b>	<p>(State configurable) This field can be suppressed whereby it can appear blank on the Patient Demographics, and Vaccination Detail windows.</p> <p>Identifying number of the Immunization Registry Management System Owner.</p>
<b>LAST UPDATE</b>	Date the patient's information was last updated.

## ADVANCED PATIENT SEARCH/ADD

When using the Advanced Search type, you must know one of the following about the patient: **First Name**, **Last Name**, or **Birth Date**.

**Note:**

If you want to use the "Simple Search Method, click on the "Click here to use the 'simple' search" hyperlink.



The (Simple) "Patient Search" window appears.  
Continue to the section titled, "Simple Patient Search/Add."

Advanced searches are useful when you are:

- Positive of how a name or alias is spelled (**EXACT**)
- Unsure of how a name or alias is spelled (**LIKE**). Used with wildcard symbols. A percent sign (%) is used to indicate multiple letters or an underscore (\_) is used for a single letter.
- Unsure of a name or alias spelling, but know what it sounds like (**PHONETIC**).

Examples are provided for each type of search.

1. If necessary, click on the "**Click here to use the 'advanced' search**" hyperlink. The (advanced) "Patient Search" window appears.



Figure 9-8: Advanced Patient Search

Patient Search <span style="float: right;">Click <a href="#">here</a> to use the 'simple' search</span>			
<b>Patient (basic information)</b>		<b>Patient (unique I.D.'s)</b>	
<b>First Name:</b>	<input type="text"/>	SSN:	<input type="text"/>
Middle Name:	<input type="text"/>	Birth File Number:	<input type="text"/>
<b>Last Name:</b>	<input type="text"/>	Medicaid Number:	<input type="text"/>
<b>Birth Date:</b>	<input type="text"/>	Chart Number:	<input type="text"/>
Birth Order:	<input type="text"/>	WIC ID:	<input type="text"/>
Multiple Birth Count:	<input type="text"/>	SIIS Patient ID / Bar Code:	<input type="text"/>
<b>Family</b>			
Guardian First Name:	<input type="text"/>	Mother's Maiden Name:	<input type="text"/>
Guardian SSN:	<input type="text"/>	(last name only)	
<b>Address</b>			
<b>Street:</b>	<input type="radio"/> P.O. Box: <input type="text"/>	<input checked="" type="radio"/> Street:	<input type="text"/>
<b>City:</b>	<input type="text"/>	<b>State:</b>	--select-- <input type="button" value="v"/>
<b>ZIP Code:</b>	<input type="text"/>	Phone Number:	<input type="text"/>
<input type="button" value="Add Anonymous"/> <input type="button" value="Clear"/> <input type="button" value="Reset"/> <input type="button" value="Search"/>			
<b>Advanced Searches:</b>		<input checked="" type="radio"/> Edit / View Only <input type="radio"/> Add / Edit / View	
<b>Simple Searches (edit or view only):</b>			
<b>Quick Searches</b>		<b>Other Searches</b>	
<input type="radio"/> First Initial, Birth Date <input type="radio"/> Last Initial, Birth Date <input type="radio"/> Social Security Number <input type="radio"/> Birth Date <input type="radio"/> Phone Number		<input type="radio"/> Birth File Number <input type="radio"/> Medicaid Number <input type="radio"/> Chart Number <input type="radio"/> WIC ID <input type="radio"/> SIIS Patient ID /	
<b>First Name / Last Name</b>			
<input type="radio"/> First Name <input type="radio"/> FN & LN <input type="radio"/> Last Name			
Select search type for First and Last Name:			
<input checked="" type="radio"/> Exact <input type="radio"/> Like (Use % or _ as wildcard characters) <input type="radio"/> Phonetic (Search by sound of word)			

This window is divided into two major areas—Patient Information (top) and Search Criteria / Types (bottom):

The Patient Information area includes the sections:

- Patient (Basic Information)
- Patient (Unique Ids)
- Family
- Address

The Search Criteria / Types area is divided into two sections or two types—Simple Search and Advanced Search.



The "known" patient criteria, determines the type of search to perform.

Figure 9-9: Advanced Search Criteria/Types

SIMPLE		ADVANCED
<b>Advanced Searches:</b> <input type="radio"/> Edit / View Only <input type="radio"/> Add / Edit / View		
<b>Simple Searches (edit or view only):</b>		
<b>Quick Searches</b>	<b>Other Searches</b>	<b>First Name / Last Name</b>
<input type="radio"/> First Initial, Birth Date	<input type="radio"/> Birth File Number	<input checked="" type="radio"/> First Name <input type="radio"/> FN & LN <input type="radio"/> Last Name
<input type="radio"/> Last Initial, Birth Date	<input type="radio"/> Medicaid Number	Select search type for First and Last Name:
<input type="radio"/> Social Security Number	<input type="radio"/> Chart Number	<input checked="" type="radio"/> Exact
<input type="radio"/> Birth Date	<input type="radio"/> WIC ID	<input type="radio"/> Like (Use % or _ as wildcard characters)
<input type="radio"/> Phone Number	<input type="radio"/> SIIS Patient ID / Bar Code	<input type="radio"/> Phonetic (Search by sound of word)

Upon entry to the "Patient Search (/Add)" window, the default setting is Edit/View Only (shown in the "Simple Search" portion of the illustration above).

2. Depending on the type of search you need to perform, you may need to click a different radio button. The types of searches that can be done are (examples of each are forthcoming):
  - Exact – (Default type.) This radio button implies you are positive of how a name is spelled.
    - a) Type the first name and last name in the appropriate fields. For example, type: Steven Smith

Figure 9-10: Exact Match Example

Patient Search	
<b>Patient (basic information)</b>	
<b>First Name:</b>	Steven
Middle Name:	
<b>Last Name:</b>	Smith
<b>Birth Date:</b>	06/03/2000

- b) The **FN & LN** and the **EXACT** radio buttons will automatically be selected.



Figure 9-11: Advanced Exact Search Example—Search Criteria/Type

First Name / Last Name		
<input type="radio"/> First Name	<input checked="" type="radio"/> FN & LN	<input type="radio"/> Last Name
Select search type for First and Last Name:		
<input checked="" type="radio"/> Exact	<input type="radio"/> Like	<input type="radio"/> Phonetic

- Like – This radio button implies you are unsure of how a name is spelled. Used with wildcard characters (%) and/or (\_). Example; we know the patient's name is either Diane or Diana; so we are unsure about the last letter. We could approach our search using the underscore (\_) wildcard character.
  - a) Type the first four letters of the name followed by an underscore. For example, type: Dian\_

Figure 9-12: Advanced Like Search Example

Patient Search	
Patient (basic information)	
First Name:	<input type="text" value="Dian_"/>
Middle Name:	<input type="text"/>
Last Name:	<input type="text"/>
Birth Date:	<input type="text"/>
SSN:	<input type="text"/>

- b) The **FIRST NAME** radio button will automatically get selected. Click the **LIKE** radio button.

Figure 9-13: Advanced Like Search Example—Search Criteria/Type

First Name / Last Name		
<input checked="" type="radio"/> First Name	<input type="radio"/> FN & LN	<input type="radio"/> Last Name
Select search type for First and Last Name:		
<input type="radio"/> Exact	<input checked="" type="radio"/> Like	<input type="radio"/> Phonetic



- Phonetic – This radio button implies you are unsure how a name is spelled, but you know how it sounds. Example; we know how the patient's name is pronounced, but unsure how to spell it. For example, the name Rachael could be spelled various ways and maybe it is really Rochelle.
- a) Type the name the way you think it is spelled. For example, type: Rachel

Figure 9-14: Advanced Phonetic Search Example

Patient Search	
Patient (basic information)	
First Name:	<input type="text" value="Rachel"/>
Middle Name:	<input type="text"/>
Last Name:	<input type="text"/>
Birth Date:	<input type="text"/>
SSN:	<input type="text"/>

- b) The **FIRST NAME** radio button will automatically get selected. Click the **PHONETIC** radio button.

Figure 9-15: Advanced Phonetic Search Example—Search Criteria/Type

First Name / Last Name	
<input checked="" type="radio"/> First Name	<input type="radio"/> FN & LN <input type="radio"/> Last Name
Select search type for First and Last Name:	
<input type="radio"/> Exact	<input type="radio"/> Like <input checked="" type="radio"/> Phonetic

3. Refer to the fields and descriptions in Table 9-3 above in the column labeled Advanced Field.
4. Determine the "type of search" you want to perform (Exact, Like, or Phonetic examples shown above).
5. Type the search criteria into the respective field(s). When you type the data into the fields, most of the radio buttons in the "Search Criteria/Type" section of the window will



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automatically be selected—excluding the Like or Phonetic radio buttons.

- When typing data into more than one field using a wildcard character, you must use a wildcard character in each of the fields. For Example: To search for all patients named Bob with a last name beginning with Bark. You would type B% in the First Name field, and Bark% in the Last Name field or an error will appear at the top of the window in red text.

6. Click one of the following buttons:

- **CLEAR** – to erase your newly entered text from the fields and remains on the same window.
- **RESET** (only activates after a **CLEAR ALL**) – Repopulates the fields to what they were before the **CLEAR ALL** was pressed.
- **SEARCH** (or the **ENTER** key) – Searches the database using the data entered and displays the "Patient Search Results" if any records are located. The view of the "Patient Search" window will focus on the "Patient Search Results" section.
  - a) **If a match is found**, it will appear in the "Patient Search Results" section. Select the patient you want to work with by clicking the **SELECT** arrow. Continue to the section titled, "Editing a Patient."
  - b) **If a match is NOT found** and you want to **ADD** the Patient, click the **EXACT** radio button and verify the name is spelled properly; i.e., remove wildcard characters if used. Continue to the section titled, "Adding a Patient (Advanced Method)."



## ADDING A PATIENT (ADVANCED METHOD)

When adding a new patient, a Patient Search is always performed first to verify the patient doesn't already exist in the system.

Figure 9-16: Patient Search – Advanced Method

Patient Search		Click <a href="#">here</a> to use the 'simple' search	
<b>Patient (basic information)</b>		<b>Patient (unique I.D.'s)</b>	
<b>First Name:</b>	<input type="text"/>	SSN:	<input type="text"/>
Middle Name:	<input type="text"/>	Birth File Number:	<input type="text"/>
<b>Last Name:</b>	<input type="text"/>	Medicaid Number:	<input type="text"/>
<b>Birth Date:</b>	<input type="text"/>	Chart Number:	<input type="text"/>
Birth Order:	<input type="text"/>	WIC ID:	<input type="text"/>
Multiple Birth Count:	<input type="text"/>	SIIS Patient ID / Bar Code:	<input type="text"/>
<b>Family</b>			
Guardian First Name:	<input type="text"/>	Mother's Maiden Name:	<input type="text"/>
Guardian SSN:	<input type="text"/>	(last name only)	
<b>Address</b>			
<b>Street:</b>	<input type="radio"/> P.O. Box: <input type="text"/>	<input checked="" type="radio"/> Street:	<input type="text"/>
<b>City:</b>	<input type="text"/>	<b>State:</b>	--select-- <input type="button" value="v"/>
<b>ZIP Code:</b>	<input type="text"/>	Phone Number:	<input type="text"/>
<div><input type="button" value="Add Anonymous"/> <input type="button" value="Clear"/> <input type="button" value="Reset"/> <input type="button" value="Search"/></div>			
<b>Advanced Searches:</b> <input checked="" type="radio"/> Edit / View Only <input type="radio"/> Add / Edit / View			
<b>Simple Searches (edit or view only):</b>			
<b>Quick Searches</b>	<b>Other Searches</b>	<b>First Name / Last Name</b>	
<input type="radio"/> First Initial, Birth Date	<input type="radio"/> Birth File Number	<input type="radio"/> First Name <input type="radio"/> FN & LN <input type="radio"/> Last Name	
<input type="radio"/> Last Initial, Birth Date	<input type="radio"/> Medicaid Number	Select search type for First and Last Name:	
<input type="radio"/> Social Security Number	<input type="radio"/> Chart Number	<input checked="" type="radio"/> Exact	
<input type="radio"/> Birth Date	<input type="radio"/> WIC ID	<input type="radio"/> Like (Use % or _ as wildcard characters)	
<input type="radio"/> Phone Number	<input type="radio"/> SIIS Patient ID /	<input type="radio"/> Phonetic (Search by sound of word)	

1. Point and click the Add/Edit/View radio button.
2. At a minimum, type the "RED labeled" fields. For example, type
  - First Name, Last Name, Birth Date
3. Type data in (at least) one field of the Family section:
  - Guardian First Name

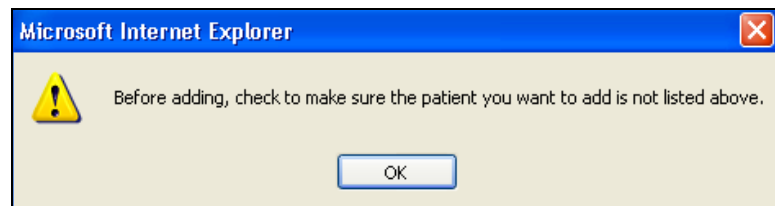


- Guardian SSN
- Mother's Maiden Name (last name only)

For example, Samantha is the Guardian's First Name.

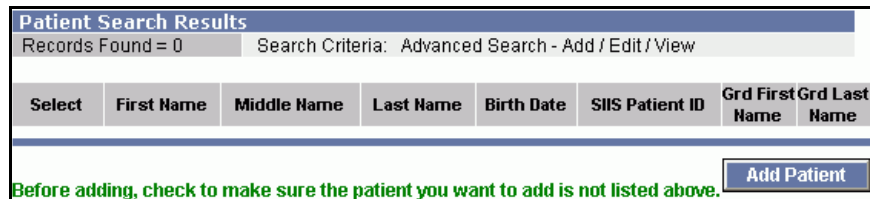
4. Type either the (entire) Address (Street including City, State, Zip) or Phone Number for the Patient. For example, type the phone number (shown below):
5. Click the **RUN SEARCH** button. A dialog box appears requesting you to check for duplications.

Figure 9-17: Patient Add – Advanced - Warning Dialog Box



6. Click the **OK** button. Another message highlighted in green text appears requesting you to review the "Patient Search Result" to ensure the patient you are adding doesn't already exist.

Figure 9-18: Patient Add – Advanced – Second Warning Dialog Box



7. Verify the patient's existence:
  - If the patient exists already, point and click the **SELECT ARROW** and refer to the section titled, "Editing a Patient" for instructions on "updating" patient information.
  - If the patient **DOESN'T** exist, click the **ADD PATIENT** button. The "Patient Add" window appears.



## Patient Menu

Patient Add			
First Name:	Sherri	Race:	White Black or African American
Middle Name:		Ethnicity:	--select--
Last Name:	Smith	Language:	--select--
Suffix:	--none--	SSN:	
Birth Date:	06/03/2000	Medicaid #:	
Gender:	--select--	Birth File #:	
Birth Order:		VFC Status:	--select--
Multiple Birth Count:		Inactive:	--select--
		Medicare #:	
Address			
Street:	<input type="radio"/> P.O. Box: <input type="text"/> Physical Address: <input type="text"/>		
	<input checked="" type="radio"/> Street: <input type="text"/>		
Country:	United States		
City:			
State:	--select--	ZIP Code:	
County/Parish:	--select--	District/Region:	
Phone Number:	(602)241-1555	Extension:	
Email:			
School:	<input type="text"/> <a href="#">Click to select</a>		
Family			
Guardian 1 First:	Dean	Guardian 1 SSN:	
Guardian 1 Middle:		Guardian 2 First:	
Guardian 1 Last:		Guardian 2 Last:	
Mother Maiden:		Guardian Work Phone:	
Other Info			
Health Plan Name:	--select--		
HP Patient ID:		HP Enroll Date:	
Physician:	--select--		
Facility:	--select--		
Next Appt. Date:		Chart Number:	
Birth Country:	United States		
Birth State:	--select--		
Block Recall:	<input type="checkbox"/>		
Allergies:			
Comments:			
Monthly Income:			
Number in Family:			
		Cancel	Reset
		Add Patient	



8. Enter as much information as possible into the fields. If necessary, refer to Table 9-4 for a list of fields and their descriptions.
9. Click on one of the available buttons.
  - **ADD PATIENT** – to save all of your information and display the "Patient Demographics" window. You will have an opportunity to EDIT the record and UPDATE PROGRAMS. (Refer to the sections titled, "Editing a Patient" and "Updating Programs," respectively.
  - **RESET** – to erase your newly typed items and remain on the same window.
  - **CANCEL** – to erase your newly typed items and exit to the "Patient Search" window.

## ANONYMOUS PATIENT SEARCH/ADD

Anonymous patients are those who have “opted out” or are exempt from the registry. By adding an anonymous patient, allows the patient's vaccination data to be included in the central registry specifically for inventory and CASA purposes.

To add an anonymous patient, perform the following:

1. Perform a **Patient Search** (using Anonymous%) to ensure the patient doesn't exist.
  - If the patient exists, the “Anonymous Patient Demographics Edit” window appears. Continue to the section titled, “Editing an Anonymous Patient.”
2. Click on the **ADD ANONYMOUS** button. The "Patient Add" window appears.

Figure 9-19: Add Anonymous Patient

Patient Add			
Birth Date:	<input type="text"/>	VFC Status:	--select--
Medicaid #:	<input type="text"/>	Inactive:	--select--
		Cancel	Reset
		Add Patient	

3. At a minimum, type data into the **RED** labeled fields such as **Birth Date**. Optionally, type in the **Medicaid #**, and click on the drop-down arrows to select the **VFC Status**, and **Inactive** (Reasons).
4. Click one of the available buttons:



- **CANCEL** – to not save and exit to the Patient Search window.
- **RESET** – to erase newly typed/selected field entries and remain on the window to re-enter fields.
- **ADD PATIENT** – to save and add the patient data and display the "Patient Demographics" window.

**Note:** After an anonymous patient is added, the "Patient Demographics" window appears with the First Name and Last Name as Anonymousxx (where xx represents a sequential number).

## BARCODE/SCANNER PATIENT SEARCH

When searching for a patient using the barcode, a printed document containing the Patient ID in barcode format must exist. This barcode document can be scanned from a Patient Record Report, an Immunization Record Card, or a Reminder Recall Postcard.

**Note:** Scanner Installation and Setup can be located in **Appendix A**.

1. Position the cursor in the **SIIS Patient ID / Bar Code** field. (By positioning the cursor, the **SIIS Patient ID / BAR CODE search radio** button automatically selects.)
2. To scan, simultaneously perform the following:
  - **Aim** at the center of the barcode, hold the scanner 0" – 1" above the barcode.
  - **Press** the **button** (located on the under side of the scanner).
3. The scanner beeps and displays a green LED and the "Patient Search Results" window appears.



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## DEMOGRAPHICS

When editing a patient's record, it begins from the "Patient Demographics" window.

**Note:** While on the "editing" window, no other menu selections can be made excluding the Cancel Edits option under the MAIN menu. It is recommended you make changes as quickly as possible.

If a **PATIENT SEARCH** hasn't been performed, perform a search first; otherwise, you can click on the **Demographics** menu option to begin editing the previously "searched" patient.

Perform one of the following to access the "Patient Demographics" window.

1. Perform a **PATIENT SEARCH** and select the desired patient from the "Patient Search Results" window by pointing and clicking the **SELECT ARROW**. The "Patient Demographics" window appears.
  - When you search for a patient, any patient who has opted out will display in the search results with **red** lettering. Only the owner (IRMS) of the record and Registry Client users can select the patient – anyone else will get a dialog box with a message.
    - a) This dialog box text is set on the properties page by a system administrator. This dialog text section will only show for clients who have purchased SIIS-Optout. Only a Registry Client user can opt in/out a patient.
    - b) The patient is selected and then the **OPT IN/OUT** button is pressed to change their status (patient demographics screen). The button should correctly indicate **OPT IN** or **OPT OUT**.
    - c) Owning and Registry Client users should be able to edit and add shots as normal.
2. Click on the **DEMOGRAPHICS** option under the **PATIENT** menu. The "Patient Demographics" window appears.



Figure 9-20: Patient Demographics

Patient Demographics			
<b>Patient</b>			
First Name:	JOHN	Race:	
Middle Name:		Ethnicity:	
Last Name:	DOE	Language:	
Suffix:		Medicaid:	
Birth Date:	01/01/2001	Birth File:	
SSN:		VFC status:	(ineligible)
Gender:	MALE	Inactive:	
Age:	246 weeks, 56 months, 4 yrs	Medicare:	
Multiple Birth:	1 of 1		
<b>Address</b>			
Street:	67 E. WELDON	Physical Address:	
City:	PHOENIX		
Country:	United States	State:	AZ
ZIP Code:	85011	County/Parish:	
Phone Number:		District/Region:	
Email:			
School:			
<b>Family</b>			
Grdn 1 First Nm:	MARY	Grdn 1 SSN:	
Grdn 1 Middle Nm:		Grdn 2 First Nm:	
Grdn 1 Last Nm:		Grdn 2 Last Nm:	
Mother Maiden Nm:		Grdn Work Phone:	
<b>Other Info</b>			
Physician:	BRADY, MARCIA MD	Health Plan Name:	
Facility:		HP Patient ID:	
Chart Number:		HP Enroll Date:	
Next Appt. Date:		Birth Country:	
Block Recall:		Birth State:	
Recall Attempts:	0	Allergies:	
Program/Mem.IDs:		High Risk:	
Monthly Income:		Number In Family:	
Comments:			
<b>Record Info</b>			
SIIS Patient ID:	1	IRMS Owner:	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Entry Date:	09/21/2005 06:28:11	Last Update:	09/21/2005 09:33:16
<b>Edit High Risk Categories</b>		<b>Update Programs</b>	<b>Opt Patient Out</b>
<b>Back</b>		<b>Edit</b>	
<b>Health Promotions Info</b>			

3. Perform one of the following by pointing and clicking one of the buttons:
  - **EDIT HIGH RISK CATEGORIES** – (State Configurable) – Allows the user to select 1 or more high risk medical categories that are appropriate for the



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patient. Continue to the section titled, “Editing High Risk Categories” for instructions.

- **UPDATE PROGRAMS** - to add or change the patient's special state programs such as WIC, KIDSHOTS, or KIDVACCS. Refer to the next section titled, "Updating a Patient's Programs."
- **HEALTH PROMOTIONS INFO** – to access the “Health Promotions Module.” You must have the access level and permissions to use this module. Health Promotions has a separate Application User Guide.
- **EDIT** - to display the "Patient Demographics-Edit" window and change the patient's record. Continue to the section titled, “Demographics- Editing.”
- **BACK** – to redisplay the “Patient Search – Search Results” window.
- **OPT PATIENT IN/OUT** – (Only available to Registry Client users). This button toggles Opt In and Opt Out. When the **OPT IN** displays, it permits the patient to join the registry and requires regular information to be entered for the patient. The **OPT OUT** button removes all data from the patient master and patient reserve tables. The data that remains is the IRMS id, Patient Birth Date, VFC Status, and Inactive Status. The Patient record becomes “Anonymous.”

**Note:** When a patient already exists in the registry, a user can only “opt out” a patient they own.

- a) An **OPT IN** checkbox will display on “Anonymous” records to allow the patient to join the registry. When checked, the regular “Patient Demographics” window appears for required information to be entered.
- b) If the patient were entered as “Anonymous,” the “Anonymous Patient Demographics Edit” window appears.



Figure 9-21: Anonymous Patient Demographics Edit

Anonymous Patient Demographics Edit			
First Name:	ANONYMOUS1000	Medicaid #:	<input type="text"/>
Last Name:	ANONYMOUS1000	VFC Status:	--select--
Birth Date:	07/01/2000	Inactive:	--select--
			<input type="checkbox"/> Opt-In Patient
			<input type="button" value="Cancel"/> <input type="button" value="Reset"/> <input type="button" value="Save"/>

- c) Make any necessary changes and click **SAVE** to save the changes, **CANCEL** to not save changes and return to the previous window, or **RESET** to erase newly entered data and remain on the window.

## EDITING PATIENT DEMOGRAPHICS

To edit a patient's record, referred to as Demographics, perform the following:

1. Click the **EDIT** button on the "Patient Demographics" window. The "Patient Demographics – Edit" window appears.



Figure 9-22: Patient Demographics - Edit

☐ Apply Defaults from Personal Settings to this Record

### Patient Demographics Edit

<b>First Name:</b>	JOHN	<b>Race:</b>	White Black or African American
<b>Middle Name:</b>		<b>Ethnicity:</b>	--select--
<b>Last Name:</b>	DOE	<b>Language:</b>	--select--
<b>Suffix:</b>	--none--	<b>SSN:</b>	
<b>Birth Date:</b>	01/01/2001	<b>Medicaid #:</b>	
<b>Gender:</b>	MALE	<b>Birth File #:</b>	
<b>Birth Order:</b>		<b>VFC Status:</b>	--select--
<b>Multiple Birth Count:</b>		<b>Inactive:</b>	--select--
		<b>Medicare Id:</b>	

### Address

☐ P.O. Box:  Physical Address:

☒ Street: 67 E. Weldon

**City:** Phoenix

**Country:** United States

**State:** AZ **ZIP Code:** 85011

**County/Parish:** --select-- **District/Region:**

**Phone Number:**  **Extension:**

**Email:**

**School:**  [Click to select](#)

### Family

<b>Guardian 1 First:</b>	MARY	<b>Guardian 1 SSN:</b>	
<b>Guardian 1 Middle:</b>		<b>Guardian 2 First:</b>	
<b>Guardian 1 Last:</b>		<b>Guardian 2 Last:</b>	
<b>Mother Maiden:</b>		<b>Guardian Work Phone:</b>	

### Other Info

**Health Plan Name:** --select--

**HP Patient ID:**  **HP Enroll Date:**

**Physician:** BRADY, MARCIA MD

**Facility:** --select--

**Next Appt. Date:**  **Chart Number:**

**Birth Country:** --select--

**Birth State:** --select--

**Block Recall:** ☐

**Allergies:**

**Comments:**

**Monthly Income:**

**Number in Family:**

☐ Do not take ownership of this record.

**Cancel** **Reset** **Save**

2. Refer to the Table 9-4 for a list of fields and descriptions.
3. The available checkboxes are:

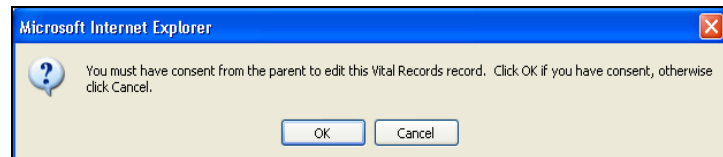


- **Apply defaults you have set in your Personal Settings** – (Located at the very top of the window). Click in the checkbox if you desire to apply your defaults. If selected, your defaults will not overwrite existing data. Continue to the next step.
  - **Do not take ownership of this record (checkbox)** – When this checkbox is checked, it prevents the IRMS from taking ownership of the patient record. A text message will appear at the top of the Vaccination Detail window when administering shots notifying the user that upon saving this vaccination(s), ownership will not be taken by the IRMS. Ownership remains with the previous owning IRMS and is not changed to the IRMS making the edit or adding the shot(s).
    - a) If the user account does not allow changes to be made to records, or the IRMS is blocked from ownership, then the checkbox will not appear.
    - b) If the IRMS that the user is logged in as already owns this patient, then the checkbox will not appear
  - **OPT OUT** – (not shown in the figure) When the **OPT OUT** checkbox is checked, a warning message appears asking, "Are you sure you want to opt out for this patient?" Click **OK** to confirm or **CANCEL** to not confirm. After the OPT OUT checkbox is selected, all data will be removed from the patient master and patient reserve tables. The data that remains is the IRMS Id, Patient Birth Date, VFC Status, and Inactive status. The record will be "flagged" as anonymous.
4. Make the necessary change(s) and then click one of the available buttons:
- **CANCEL** – does NOT save changes and exits to the "Patient Demographics" window.
  - **RESET** – erases the newly entered selections and remains on the "Patient Demographics-Edit" window.
  - **SAVE** – updates the database with your change(s) and exits to the "Patient Demographics" window.



**Note:** Depending on your state, you may see a "consent" dialog box.

**Figure 9-23: Consent Dialog Box (State Configurable)**



- a) If you click **OK**, the "Patient Demographics" window re-displays.
- b) Obtain consent and then click **OK** or click **CANCEL**.

## EDITING A PATIENT - ANONYMOUS

Anonymous patients are those who have "opted out" or are exempt from the registry. By adding an anonymous patient allows the patient's vaccination data to be included in the central registry specifically for inventory and CASA purposes.

To edit an anonymous patient, perform the following:

1. Perform a **Patient Search** to ensure the patient exists.
2. Click on the **SELECT** button to select the anonymous patient. The "Patient Demographics" window appears.
3. Click on the **EDIT RECORD** button. The "Anonymous Patient Demographics Edit" window appears.

**Figure 9-24: Anonymous Patient Demographics Edit**

Anonymous Patient Demographics Edit			
First Name:	ANONYMOUS1000	Medicaid #:	<input type="text"/>
Last Name:	ANONYMOUS1000	VFC Status:	--select-- <input type="button" value="v"/>
Birth Date:	07/01/2000	Inactive:	--select-- <input type="button" value="v"/>
			<input type="checkbox"/> Opt-In Patient
			<input type="button" value="Cancel"/> <input type="button" value="Reset"/> <input type="button" value="Save"/>

4. Make the changes and press one of the available buttons:
  - **CANCEL** – to not save entries made and return to the "Patient Demographics" window.
  - **RESET** – to erase newly entered/selected entries and remain on the window.



- **SAVE** – to save the changes and return to the "Patient Demographics" window.

**Note:** The **OPT IN / OPT OUT PATIENT** checkbox is available to Registry Client users.

- The **OPT IN** checkbox will display on anonymous records to allow the patient to join the registry. When checked, the regular "Patient Demographics" window appears for required information to be entered. When the patient already exists in the registry, a user can only "opt out" a patient they own.
- The **OPT OUT** checkbox will appear at the bottom of the regular "Patient Demographics-Edit" window. When the OPT OUT checkbox is checked, a warning message appears asking, "Are you sure you want to opt out for this patient?" Click **OK** to confirm or **CANCEL** to not confirm.
  - a) After the OPT OUT checkbox is selected, all data will be removed from the patient master and patient reserve tables. The data that remains is the IRMS Id, Patient Birth Date, VFC Status, and Inactive status.
  - b) The patient record becomes "Anonymous."

## UPDATING A PATIENT'S PROGRAMS

This option allows you to enter special programs offered by your state. For example: WIC, KIDSHOTS, KIDVACCS, etc. These programs will differ per state.

You can perform the following from this window:

- Add Programs and Member IDs
- Update/Edit Programs and Member IDs
- Remove Programs and Member IDs



This option is not directly off the menu but begins on the "Patient Demographics" window. You must perform a Patient Search first. If necessary, refer to the section regarding Patient Search (/Add).

1. From the "Patient Demographics" window, point and click on the **UPDATE PROGRAMS** button. The "Patient Programs Add/Remove" window appears.

**Figure 9-25: Patient Programs Add/Remove**

Patient	
Name:	MIKE MCDOWELL
Date Of Birth:	09/26/1960
Guardian:	FLORENCE

Patient Programs Add/Remove	
Add Program: (select a program to ADD and enter Member ID, if known)	
--select--	Member ID: <input type="text"/>
Update Current Program: (select a program to UPDATE and enter new Member ID)	
--select--	Member ID: <input type="text"/>
Remove Current Programs/Member IDs: (check programs to REMOVE)	
(none)	

2. If Adding a Program, perform the following; otherwise, continue to the next step.
  - Under the Add section, click on the Down-Arrow for a list of available program choices.
  - Select the Program by pointing and clicking it.

**Note:** All Programs are entered into the registry at the state level. If you want to track a program that is not on the list, contact the state to have it added.

- Press the **TAB** key.
- Type the **MEMBER ID** (if known).
- Click the **SAVE CHANGES** button. The "Patient Demographics" window re-appears.

**Note:** When you re-enter this window, your change(s) will display under the sections titled "Update Current Programs" and "Remove Current Programs" followed by the Member IDs.

3. If Updating a Current Program, perform the following bulleted items; otherwise, continue to the next step.



- Under the **UPDATE** section, click on the Down-Arrow for a list of available program choices.
  - **Select** the Program by pointing and clicking it.
  - Press the **TAB** key.
  - Update the **MEMBER ID** (if necessary).
  - Click the **SAVE CHANGES** button. The "Patient Demographics" window re-appears.
4. If Removing a Current Program, perform the following bulleted items; otherwise, continue to the next step.
- Under the **REMOVE** section, click on the Checkbox to the left of the Program to remove.
  - Click the **SAVE CHANGES** button. The "Patient Demographics" window re-appears.

**Note:** You cannot update and remove at the same time. In other words, if you attempt both actions, a REMOVE will override the update.

## EDITING HIGH RISK CATEGORIES

This is a state configurable option that allows the user to select 1+ high risk medical categories that are appropriate for the patient. If the state has not defined any categories, this functionality will be invisible to the end user.

**Note:** These conditions are private and cannot be seen outside of the IRMS; however, a flag indicating the patient has 1+ high risk categories will be public information. The flag is a message stating to "Contact the primary care provider for more information about this patient's high risk categories."

1. From the "Patient Demographics" window, click the **EDIT HIGH RISK CATEGORIES** button. The "Patient High Risk Categories" window appears.



Figure 9-26: Patient High Risk Categories

Patient			
Name:	SALLY SMITH	SIIS Patient ID:	122743
Date of Birth:	06/03/1960	Age:	44 yrs
Guardian:	GEORGIA	Status:	Active

Patient High Risk Categories	
Available Categories	Current Categories
<div>VALLEY FEVER</div>	
<div>&gt;&gt;</div> <div>&lt;&lt;</div>	

[Back](#)

2. In the bottom section of the window there are two categories: Available and Current. To move an Available Category to the Current Category, perform the following:
  - Highlight the Available Categories. To select more than one category,
    - a) In a sequence, hold the **SHIFT** key, click the first category in the sequence, and then click the last category in the sequence.
    - b) Not in a sequence, hold the **CTRL** key and click on each category.
  - Click the (**RIGHT**) **ARROW** button to copy the Available Categories to the Current Categories column.
3. To remove a Current Category back over to the Available Categories, perform the following:
  - Highlight the Current Categories. To select more than one category,
    - a) In a sequence, hold the **SHIFT** key, click the first category in the sequence, and then click the last category in the sequence.
    - b) Not in a sequence, hold the **CTRL** key and click on each category.
  - Click the (**LEFT**) **ARROW** button to copy the Current Categories to the Available Categories column.



4. A red confirmation message appears at the top of the window stating, "Patient High Risk Categories Successfully Changed."
5. Click the **BACK** button to return to the "Patient Demographics" window. The "High Risk" field will display in red.

## REMOTE REGISTRY

The "Remote Registry" option allows you to query other immunization registries for existing vaccination records for an existing patient. This provides a solution similar to the "single inquiry" found within the PCI Gateway Client.

The "Remote Registry" option will only display after a patient has been searched for and selected or added.

The "state-to-state" User Agreement system will depend on both states ("home-state" and "out-of-state") that are using the IWEB Registry or a registry with similar capabilities. To clarify these states, "home state" is the registry that requests access to a patient record in another state and "out of state" is the registry providing access to a requesting provider/user.

The "home state" registry administrator will obtain a login account and the "out of state" agreement from the "out-of-state" registry administrator.

The "home state" registry administrator will then enter this information into their "home-state" registry. The "home state" system (IWEB for example) will then be responsible for assuring that only logged in users who have agreed to the "out-of-state" registry user agreement, are allowed to query the "out-of-state" registry.

The "out-of-state" registry cannot block a specific user from querying the "out-of-state" registry; however, every query is logged in the "out-of-state" registry with the "home-state" registry username. In cases of misuse, "out-of-state" registry staff may contact the "home-state" registry staff and request that a specific user be denied query access, or in extreme cases, the "out-of-state" registry staff can disable the entire "home-state" registry account.



Perform a **PATIENT SEARCH** on the patient whose records you want to match and merge vaccination records.

6. From the "Patient Menu, click the **REMOTE REGISTRY** option. One of two windows may appear:
  - The "User Agreement Acceptance" window.

Figure 9-27: User Agreement Acceptance

- The "Remote Registry Connections" window.

Figure 9-28: Remote Registry Connections

7. If the "User Agreement Acceptance" window appears, read the agreement and click **YES** if you agree to the terms listed, or click **NO** if you do not agree to the terms.

**Note:** Once you click **YES**, you will not see this window again unless a new User Agreement has been created.

8. If the "Remote Registry Connections" window appears, click the drop-down menu arrow to select the **REMOTE CONNECTION**.
9. Click on the **QUERY** button. The "matching" process begins.
  - If an **EXACT** match is found, no vaccination records will appear.
  - If matches are found, the records will appear on the "Remote Registry Connections" window below the "User Agreement" message (shown below).



Figure 9-29: Remote Registry Connections with Patient Records

Remote Registry Connections		
Remote Connection	test	
show HL7 <input type="checkbox"/> <a href="#">Query</a> <a href="#">Send Update</a>		
User Agreement		
The use of the following information is bound by the conditions of the <a href="#">Test</a> which you accept on 12/06/2004.		
Patient 1	test - Remote	STC - Local
Patient ID	122724	1
First name	JANE	JOHN
Middle name		
Last name	DOE	DOE
Suffix		
Birth date	01/01/2001	01/01/2001
SSN		123-45-8520
Gender	F	MALE
Street	123 MAIN ST	123 MAIN ST
City	GLENDALE	GLENDALE
ZIP code	85301	85304
Phone	(654)840-9819	(602)241-1502
Mother maiden name		
<a href="#">Get Vaccination Record 1</a>		
Patient 2	test - Remote	STC - Local
Patient ID	122710	1
First name	JOHN	JOHN
Middle name		
Last name	DOE	DOE
Suffix		
Birth date	01/01/2001	01/01/2001
SSN		123-45-8520
Gender		MALE
Street	123 MAIN ST	123 MAIN ST
City		GLENDALE
ZIP code		85304
Phone		(602)241-1502
Mother maiden name		
<a href="#">Get Vaccination Record 2</a>		
Patient 3	test - Remote	STC - Local
Patient ID	57600	1
First name	JOHNNA	JOHN
Middle name	M	
Last name	DAY	DOE
Suffix		
Birth date	08/17/2000	01/01/2001
SSN		123-45-8520
Gender		MALE
Street		123 MAIN ST
City		GLENDALE
ZIP code		85304
Phone		(602)241-1502
Mother maiden name		
<a href="#">Get Vaccination Record 3</a>		

- Review and compare the records trying to locate the record that best matches. Once you locate the best record, click the **GET VACCINATION RECORD (#)** button to view all the vaccinations. The "Patient Record and all Vaccinations" window appears.



Figure 9-30: Patient Record &amp; All Vaccinations

Remote Registry Connections				
Remote Connection	test ▼			
show HL7 <input type="checkbox"/>				<input type="button" value="Query"/> <input type="button" value="Send Update"/>
User Agreement				
The use of the following information is bound by the conditions of the <a href="#">Test</a> which you accept on 12/06/2004.				
Patient Record	test - Remote	STC - Local		
Patient ID	122724	1		
First name	JANE	JOHN		
Middle name				
Last name	DOE	DOE		
Suffix				
Birth date	01/01/2001	01/01/2001		
SSN		123-45-8520		
Gender	F	MALE		
Street	123 MAIN ST	123 MAIN ST		
City	GLENDALE	GLENDALE		
ZIP code	85301	85304		
Phone	(654)840-9819	(602)241-1502		
Mother maiden name				
Vaccinations				
Vaccine	CDC Code	CPT Code	SIIS Code	Date
<input type="checkbox"/> DTaP	20	90700	20	03/01/2001
<input type="checkbox"/> DTaP	20	90700	20	05/01/2001
<input type="checkbox"/> DTaP	20	90700	20	07/01/2001
<input type="checkbox"/> DTaP	20	90700	20	01/01/2002
<input checked="" type="checkbox"/> Hib, NOS <i>new</i>	17	90645	47	03/01/2001
<input checked="" type="checkbox"/> Hib, NOS <i>new</i>	17	90645	47	05/01/2001
<input checked="" type="checkbox"/> Hib, NOS <i>new</i>	17	90645	47	07/01/2001
<input checked="" type="checkbox"/> Hib, NOS <i>new</i>	17	90645	47	01/01/2002
<input checked="" type="checkbox"/> MMR <i>new</i>	03	90707	3	01/29/2002
<input type="checkbox"/> varicella	21	90716	21	01/01/2002
<input type="button" value="Reset"/> <input type="button" value="Merge Vaccinations"/>				

11. In the Vaccinations section, any vaccines that are "unchecked" will not merge. Conversely, those that are checked will get merged.
12. Click one of the available buttons:
  - **RESET** – to erase any newly selected/checked items and remain on the same window.
  - **MERGE VACCINATIONS** – to merge the vaccinations and display the patient's "Vaccination View/Add" window. A red confirmation message appears at the top of the window denoting the vaccination (with the vaccine and merge date) record was merged.



Figure 9-31: Vaccination View/Add

Vaccination 1PV\*, administered 06/02/2004 was added

Patient			
Name:	NATHAN BUNKER	SIIS Patient ID:	122745
Date of Birth:	12/08/1996	Age:	7 yrs
Guardian:	MARY	Status:	Active

[Print Page](#)

**Vaccination View/Add**  
(historicals marked by \*, adverse reaction marked by #)

Facility where vaccines documented: --select--

Double-click in any date field below to enter the default date: 07/26/2004

Vaccine	1	2	3	4	5
DTaP	05/04/2003	X 03/19/2004	X 05/03/2004	X 05/04/2004	
Td (Adult)	04/30/2004				
IPV	06/02/2004				
Hib--HbOC	X 05/04/2004				
Hep B/Hib	X 03/31/2004				
MMR	03/31/2004				
Varicella	05/28/2004				
Hepatitis B--adol. or pediatric	03/31/2004				
DTaP, 5 pertussis antigens					
DTaP--unspecified					
DTaP/Hib					
DTaP/Hep B/MPV					
DT (Pediatric)					
Hib--unspecified					
Hep B Ped/Adol - Preserv Free					
Pneumococcal(PCV7)					
--select--					
--select--					
--select--					

[Add Administered](#) [Clear All](#) [Add Historicals](#)

- Vaccinations outside the ACIP schedule are marked with an 'X'.
- If a combination vaccine is marked with a 'X', please verify which components of the vaccine are outside the ACIP schedule by viewing the Vaccination Summary.
- Vaccinations administered or recorded in your facility are displayed in blue.
- Compromised vaccinations are highlighted in yellow.

[Add Smallpox History](#) [Contraindications](#) [Deferrals](#)

13. The vaccination record has been merged. You can use any other menu and/or option.



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## 10 VACCINATIONS MENU

The Vaccination Menu allows you to **View, Add, Forecast**, and **Summarize** vaccination information.

This menu has three options:

- View/Add
- Forecast
- Summary

Locate the name of the menu option you want to use and continue to its coinciding section.

### VIEW/ADD (VACCINATIONS)

All vaccination information is viewed, added, and edited from inside this option. From the View/Add window, you can perform the following:

- View additional details about the vaccination including comments about the vaccine
- Edit and/or delete vaccination information
- Add new vaccination (shot administrations)
- Add historical vaccination information
- Add smallpox history prior to the year 1990
- Add chickenpox disease (state configurable)
- Add contraindications
- Forecast (an option that is either on or off)



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## VIEWING ALL VACCINATIONS FOR A PATIENT

The System Administrator has the authority to setup the Vaccinations in alphabetical order. If this has been setup, the vaccinations will appear in alphabetical order. First the administered vaccinations will appear, followed by the un-administered vaccinations. Contact your System Administrator for additional information.

To view all of a patient's vaccinations, perform the following steps:

1. From the **PATIENT** menu, point and click **SEARCH (/ADD)**.
2. Perform a Patient Search.
3. Point and click the **SELECT ARROW** to select the desired patient whose vaccinations you want to view. The "Patient Demographics" window appears.
4. Click the **VACCINATION VIEW/ADD** menu option. The patient's "View/Add Vaccination" window appears with the patient's demographic information at the top of the window.



Figure 10-1: Vaccination View/Add

[Print Page](#)

**Vaccination View/Add**  
(historicals marked by \*, adverse reaction marked by #, unverified historicals marked by +)

Facility where vaccinations documented: --select--

Double-click in any date field below to enter the default date: 09/22/2005

Vaccine	1	2	3	4	5
DTaP	03/01/2001	05/01/2001	07/01/2001	01/01/2002	
IPV	05/05/2001 *				
Hib--unspecified	03/01/2001 *	05/01/2001 *	07/01/2001 *		
Hep B Ped/Adol - Preserv Free	01/01/2001 *				
Pneumococcal(PCV7)	03/01/2001 *	05/01/2001 *	07/01/2001 *		
MMR	01/01/2002 *				
Varicella	01/01/2002 *				
Polio - unspecified	03/01/2001 *				
Td (Adult)					
Hep B/Hib					
Meningococcal Conjugate (MCV4)					
--select--					
--select--					
--select--					

☐ Do not take ownership when adding vaccinations.

[Add Administered](#) [Clear](#) [Add Historicals](#)

- Vaccinations outside the ACIP schedule are marked with an 'X'.
- If a combination vaccine is marked with a 'X', please verify which components of the vaccine are outside the ACIP schedule by viewing the Vaccination Summary.
- Vaccinations administered or recorded in your facility are displayed in blue.
- Compromised vaccinations are highlighted in yellow.

[Add Smallpox History](#) [Contraindications](#) [Deferrals](#)

**Allergies**

**Comments**

**Vaccination Forecast**  
The forecast automatically switches to the accelerated schedule when a patient is behind schedule.

Vaccine Family	Dose	Recommended Date	Minimum Valid Date	Status
HEP-B 3 DOSE**	2	02/01/2001	01/29/2001	Past Due
FLU	1	07/01/2001	07/01/2001	Past Due
POLIO	3	07/05/2001	06/02/2001	Past Due
HIB	4	01/01/2002	01/01/2002	Past Due
PNEUMO (PCV7)	4	01/01/2002	01/01/2002	Past Due
DTaP/DT/Td*	5	01/01/2005	01/01/2005	Due Now
MMR	2	01/01/2005	01/01/2005	Due Now
HEP-B 2 DOSE**	1	01/01/2012	01/01/2012	Up to Date
MENINGOCOCCAL	1	01/01/2012	01/01/2012	Up to Date

\* DTaP or DT should be given to patients under 7 years old. Td should be given to patients 7 years old or older.

\*\* If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.

**Due Now** -- As of today's date, the patient's age falls between the recommended minimum age and the recommended maximum age for this dose and the absolute minimum interval has been met since the last dose.

**Past Due** -- As of today's date, the recommended maximum age or the recommended maximum date for this dose has passed.

**Up to Date** -- As of today's date, the patient is not due or past due.



**Note:** Depending on your user access and permissions, you may not see all of the buttons shown in the above illustration.

5. Refer to the table for an explanation of the fields and their descriptions.

**Table 10-1: Vaccination View/Add Fields**

FIELD	DESCRIPTION
<b>PATIENT DEMOGRAPHICS</b>	
<b>NAME</b>	Name of patient whose vaccinations you are viewing.
<b>DATE OF BIRTH</b>	Patient's date of birth.
<b>GUARDIAN</b>	Name of patient's guardian.
<b>SIIS PATIENT ID</b>	State Immunization Information System Patient Identification number.
<b>AGE</b>	Age of the patient in weeks, months, and years.
<b>STATUS</b>	Status of the patient. Inactive, Moved out of state, etc.
<b>VACCINATION VIEW/ADD</b>	
<b>FACILITY WHERE VACCINES DOCUMENTED</b>	Name of the Facility where the shot administration took place. Click on the drop-down arrow for a list of valid choices. If a Facility Display (Abbreviated) Name was entered, it will appear in the list as opposed to the full name of the facility.
<b>DOUBLE-CLICK IN ANY DATE FIELD BELOW TO ENTER THE DEFAULT DATE (TODAY'S DATE)</b>	Today's date will display as the default. This date can be changed and will be saved throughout the duration of the active session.
<b>VACCINE NAME</b>	Name of the vaccine. This field cannot be edited. Located to the right is the Date/Dose number field.  If a patient has a history of varicella reported, the word "History" will appear in the first cell in the "Varicella" row of the shot grid. In addition, the "history of



FIELD	DESCRIPTION
	<p>chickenpox" notification will be turned on at the top of the shot grid, replacing the current contraindication message in the case of the patient having a history of varicella.</p> <p>If you attempt to give a patient an administered shot of an "unspecified" vaccine type, a warning message appears at the top of the window. You are required to do one of the following:</p> <ul style="list-style-type: none"><li>• Cancel this vaccine type and choose a specific "administered" type.</li><li>• Mark the vaccination as historical versus administered.</li><li>• Click the checkbox to "ignore warning and add the unspecified vaccinations."</li></ul>
<b>DATE / DOSE ADMINISTERED</b>	<p>Date and Dose Number of the shot given.</p> <p><b>Note:</b> More than one vaccination from the same vaccine family cannot be entered on the same date.</p> <p>A <b>YELLOW</b> date indicates a Compromised vaccine.</p> <p>A <b>BLUE</b> date indicates the vaccine was administered or recorded at the user's facility. If you are an IRMS user and don't have any facilities defined, and the blue date indicates that the user's IRMS and SHOT match.</p> <p>A <b>(Red) X</b> to the left of the date indicates the vaccine was given outside the ACIP schedule. View the Vaccination Summary for details.</p> <p><b>Note:</b> If a combination vaccine is marked with a red X, please verify which components of the vaccine are outside the ACIP schedule by viewing the Vaccination Summary.</p>



FIELD	DESCRIPTION
	<p><b>Asterisk</b> * to the right of the date indicates a shot that was not administered on the date it was entered. This denotes a “historical” vaccination.</p> <p><b>Pound sign #</b> to the right of the date indicates an adverse reaction occurred.</p> <p><b>History</b> to the right of the Varicella vaccine, indicates the patient has a history of varicella. In addition, the “history of chickenpox” notification will be turned on at the top of the shot grid, replacing the current contraindication message in the case of the patient having a history of varicella.</p>
<p><b>DO NOT TAKE OWNERSHIP WHEN ADDING VACCINATIONS (CHECKBOX)</b></p>	<p>When this checkbox is checked, it prevents the IRMS from taking ownership of the patient record. A text message will appear at the top of the Vaccination Detail window when administering shots notifying the user that upon saving this vaccination(s), ownership will not be taken by the IRMS. Ownership remains with the previous owning IRMS and is not changed to the IRMS making the edit or adding the shot(s).</p> <ul style="list-style-type: none"> <li>• If the user account does not allow changes to be made to records, or the IRMS is blocked from ownership, then the checkbox will not appear.</li> <li>• If the IRMS that the user is logged in as already owns this patient, then the checkbox will not appear</li> </ul>
<p><b>ALLERGIES</b></p>	
<p>If the patient has any allergies, they will be listed in this area.</p>	
<p><b>COMMENTS</b></p>	
<p>If there is any other pertinent information about the patient or</p>	



FIELD	DESCRIPTION
vaccinations, they will be listed here.	
<b>VACCINATION FORECAST</b>	
<b>VACCINE FAMILY STATUS</b>	Vaccine name of the shots that will be due for a specific patient.
<b>DOSE</b>	Dose Number for the Vaccine shot.
<b>RECOMMENDED DATE</b>	Recommended date for the Shot.  <b>Note:</b> For states that want to forecast for HepA, a database setting has been added to do so; otherwise, forecasting behaves as usual.
<b>MINIMUM VALID DATE</b>	Earliest date of validity for the shot.
<b>STATUS</b>	Status of the shot. Examples are: <ul style="list-style-type: none"> <li>• <b>Due Now</b> – As of today's date, the patient's age falls between the recommended minimum age and the recommended maximum age for this dose and the absolute minimum interval has been met since the last dose.</li> <li>• <b>Past Due</b> – As of today's date, the recommended maximum age or the recommended maximum date for this dose has passed.</li> <li>• <b>Up to Date</b> – As of today's date, the patient is not due or past due.</li> </ul>

6. Determine the action you want to perform by typing text in the DATE field or by clicking on one of the available buttons. The field(s) and buttons are:
  - Erase all newly typed data from the data fields by clicking the **CLEAR** button.



- Set a **DEFAULT DATE** by typing in the date you want to use for the duration of your active login session.
- View **VACCINATION DETAILS** by clicking on an existing date/dose field.
- Add an **ADMINISTERED** Vaccination by clicking on the button. The "Vaccination Detail – Add" window appears.
- Add **HISTORICAL** vaccination information by clicking on the button after typing the historical date.
- Add **SMALLPOX HISTORY** (prior to 1990) by clicking on the button. The "Previous Vaccination Smallpox – Add" window appears.
- Add a Vaccine **CONTRAINDICATION** by clicking on the button. The "Vaccine Contraindications – Add" window appears. The button will turn red when a contraindication has been added.
- Add **DEFERRALS** by clicking on the button. The "Vaccine Deferrals" window appears.
- Print the display by clicking the **PRINT PAGE** hyperlink. This is configurable by the state. When the patient has more than 10 vaccines, the vaccines will wrap so they all appear on the report.
- Add **CHICKENPOX HISTORY/REMOVE CHICKENPOX HISTORY**. This is configurable by the state and is used to record whether the patient has had the chickenpox disease.

7. Continue to the respective section for instructions.

## SETTING A DEFAULT DATE FOR VACCINATION ENTRIES

To set a default date, although state configurable, automatically populates the Vaccination Date while entering vaccinations, perform the following steps:

1. Locate the blank date field to the right of the field label that displays, "Double-click in any date field to enter the default date."



**Note:** This date cannot be a future date.

Figure 10-2: Vaccination View/Add—Set Default Date

Patient			
Name:	BOB R ARTHUR	SIS Patient ID:	83123
Date of Birth:	02/26/1952	Age:	52 yrs
Guardian:		Status:	Active

[Print Page](#)

Vaccination View/Add	
(historicals marked by *, adverse reaction marked by #)	
Facility where vaccines documented:	--select--
Double-click in any date field below to enter the default date: 07/22/2004	

**Note:** More than one vaccination from the same vaccine family cannot be entered on the same date.

2. The change is immediate; hence, if you double-click in the Date / Dose field, this date will automatically display for the duration of the session or until you logout.

## VIEWING DETAILS ABOUT A VACCINATION

Your user access determines whether you can edit or delete vaccine information, so you may not see the same edit and delete buttons at the bottom of the window.

1. Point and click in a **DATE/DOSE** field of the vaccination you want to view. The "Vaccination Detail" window appears.



Figure 10-3: Vaccination Detail

<b>Patient</b>			
Name:	JOHN SMITH	SIIS Patient ID:	3
Date of Birth:	01/01/1930	Age:	75 yrs
Guardian:	MARY	Status:	Active
<b>Vaccination Detail</b>			
<b>Vaccine:</b>	Td (Adult)		
<b>Date Administered:</b>	06/04/2005		
<b>Invalid Vaccination:</b>	Invalid DTaP/DT/Td*: Minimum interval from previous dose not met.		
Historical:	No		
Manufacturer:			
Lot Number:			
Lot Facility:			
Publicly Supplied:	No		
Vaccinator:			
IRMS:	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID		
Facility:			
Anatomical Site:			
Volume (CC):			
VFC Status:			
Adverse Reaction:			
District/Region:			
Dates of VIS Publications:			
Date VIS Form Given:	06/04/2005		
Comments:			
<div> <span>Cancel</span> <span>Edit Record</span> <span>Delete Record</span> </div> <div>Add/Edit Adverse Reactions</div>			

2. The fields and their descriptions are listed in the table.

Table 10-2: Vaccination Detail Add/Edit Fields

FIELD	DESCRIPTION
<b>VACCINE NAME</b>	Refer to the previous table for a description.
<b>DATE ADMINISTERED</b>	Refer to the previous table for a description.
<b>INVALID VACCINATION</b>	(State configurable) Displays the reason the vaccination was invalid. <b>Note:</b> This will also display on the Vaccination Summary window.



FIELD	DESCRIPTION
<b>HISTORICAL</b>	<p>HISTORICAL indicates a shot was recorded by a facility or vaccinator but didn't administer it. Click the YES radio button if it's historical; otherwise, verify the NO radio button is selected.</p> <p><b>Note:</b> More than one vaccination from the same vaccine family cannot be entered on the same date if the administrator set it in the Properties file.</p>
<b>MANUFACTURER</b> <b>LOT NUMBER</b> <b>LOT FACILITY</b> <b>PUBLICLY SUPPLIED</b>	<p>These fields work together. To edit the fields, either click the "Click to select" hyperlink or click in any of the four fields.</p> <p><b>Manufacturer</b> – Name of the Vaccine Manufacturer.</p> <p><b>Lot number</b> – Number of the Vaccine lot</p> <p><b>Lot Facility</b> – Location of the vaccine</p> <p><b>Publicly Supplied</b> – Indicates whether the vaccine was publicly supplied or not (Yes or No). This is retrieved from the Lot Number information unless it is imported with a vaccination sent via batch with the Data Translation Tool.</p> <p><b>Note:</b> There is a state-configurable option that prevents publicly supplied vaccine from being administered to VFC Ineligible patients. If the option is configured and a user attempts this, a warning message appears stating to either modify the VFC status or administer a private supplied vaccine.</p> <p>When the VFC Eligibility Update is enabled for your state and a vaccination is added or edited, the updated VFC Eligibility and Lot Publicly Supplied Status will be stored in the vaccination tables. This allows a detailed history of VFC status changes for each patient.</p>
<b>VACCINATOR</b>	<p>Name of the person giving the vaccination. Click on the drop-down arrow for a list of valid choices.</p>
<b>IRMS</b>	<p>(State configurable) This field can be suppressed whereby it can appear blank on the Patient Demographics, and Vaccination Detail windows.</p>



FIELD	DESCRIPTION
	<p>Number of the IRMS providing the vaccination.</p> <p><b>Note:</b> When the IRMS is selected, every window containing the IRMS field will automatically populate with a default IRMS.</p>
<b>FACILITY</b>	<p>Name of the Facility where the shot administration took place. Click on the drop-down arrow for a list of valid choices. If a Facility Display (Abbreviated) Name was entered, it will appear in the list as opposed to the full name of the facility.</p>
<b>ANATOMICAL SITE</b>	<p>Location of the injection.</p> <p>When adding vaccinations for DTaP, MMR, IPV, and Varicella, this field may automatically be filled in.</p> <p><b>Note:</b> This is a setting that gets set in Personal Settings to allow for an (optional) "minimum and maximum age" so this field may already be filled.</p> <p>If this field isn't automatically filled in, you will need to click on the drop-down menu arrow to view/select a valid choice.</p>
<b>ADVERSE REACTION</b>	<p>A reaction to the vaccination given. Click on the drop-down arrow for a list of valid choices.</p>
<b>VFC STATUS</b>	<p>Vaccine for Children Status. Is either <b>eligible</b> or <b>ineligible</b>.</p> <p><b>Note:</b> There is a state-configurable option that prevents publicly supplied vaccine from being administered to VFC Ineligible patients. If the option is configured and a user attempts this, a warning message appears stating to either modify the VFC status or administer a private supplied vaccine.</p> <p>For the vaccination to be VFC eligible, the child must be VFC eligible on the patient demographics screen and the vaccine must be publicly supplied.</p> <p>When the VFC Eligibility Update is enabled for your state and a vaccination is added or edited, the updated VFC Eligibility and Lot Publicly Supplied Status will be stored in the vaccination tables. This allows a detailed</p>



FIELD	DESCRIPTION
	history of VFC status changes for each patient.
<b>REVACCINATION REASON</b>	<p>This option is state configurable.</p> <p>When a patient is revaccinated because the prior vaccination was compromised, the "Revaccination Reason" allows the user to document the reason the vaccination was compromised.</p> <p>This will also be revealed on the patient's immunization history and any reports that show the patient's complete vaccination record. Also, the vaccination the revaccination replaced would not be counted in the patient's vaccination forecast.</p>
<b>DISTRICT/REGION</b>	<p>District or Region where the vaccination was administered.</p> <p><b>Note:</b> When the IRMS is selected, every window containing the District field will automatically populate with a default District.</p>
<b>DATES OF VIS PUBLICATIONS</b>	Publication Dates of the Vaccine Information Sheet (VIS).
<b>DATE VIS FORM GIVEN</b>	Date the VIS form was given to the patient.
<b>COMMENTS</b>	Free-form field for entering any notes regarding the vaccination.

3. Click on one of the available buttons:
  - **CANCEL** – to return to the "Vaccination View/Add" window.
  - **EDIT RECORD** – to edit the record by displaying the "Vaccination Detail Edit" window. Continue to the respective section.
  - **DELETE RECORD** – to delete the vaccination record. Continue to the respective section.

### ADDING AN ADMINISTERED VACCINATION RECORD

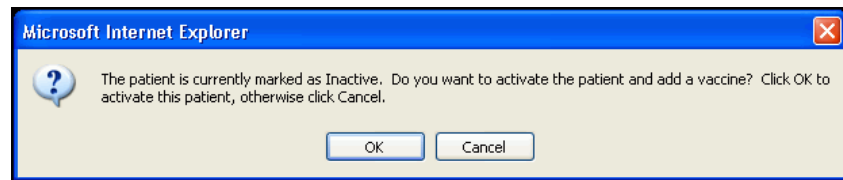
An administered vaccination is one that is given at your facility. A state configurable setting may not allow more than one vaccination from the same vaccine family cannot be entered on the same date.



**Note:** Although state specific, there are laws (Louisiana and Washington) that state in order for a child to get into school, a child must receive an IPV on or after their 4th birthday—regardless if they already meet the 4 IPV's according to the ACIP schedule. A 4th dose given prior to 4 years of age should show as invalid.

When adding a vaccination and the **patient record** is "**inactive**," a pop-up window may appear (if configured by the state).

**Figure 10-4: Patient is Inactive - Activate**



This is a warning to let you know that the patient is inactive and prompts you asking if you want to "activate" the patient. You have the option of choosing "Yes" or "No."

- **OK** – will immediately activate the patient and displays the "Vaccination Detail Add" window.
- **CANCEL** – will not activate the patient and remains on the "Vaccination View/Add" window.

**Note:** There is a state-configurable option that prevents publicly supplied vaccine from being administered to VFC Ineligible patients. If the option is configured and a user attempts this, a warning message appears stating to either modify the VFC status or administer a private supplied vaccine.

To add an administered vaccination, perform the following:

1. From the **PATIENT** menu, point and click **SEARCH (/ADD)**.
2. Perform a **Patient Search**.
3. Point and click the **SELECT ARROW** to select the desired patient whose vaccinations you want to view. The "Patient Demographics" window appears.



4. Click the **VACCINATION VIEW/ADD** menu option. The patient's "Vaccination View/Add" window appears.
5. Verify the **FACILITY** name is correct. Click on the drop-down arrow to view a list of choices.
6. Locate the **VACCINE NAME** and **DOSE NUMBER**.
  - If you don't see it in the "shortcut" section, click on an available down-arrow for the full name at the bottom of the window.

**Note:** Your System Administrator sets up the vaccine/medication shortcuts for your state.

- Double-click in the field to enter the "default date" or type the date using the format mmddyyyy.
7. Click the **ADD ADMINISTERED** button. The "Vaccination Detail Add" window appears.

Figure 10-5: Vaccination Detail Add

Vaccination Detail Add	
Vaccine 1:	DTaP
Date Administered:	09/28/2005
Historical:	<input type="radio"/> YES <input checked="" type="radio"/> NO
Manufacturer:	ABBOT <a href="#">Click to select</a>
Lot Number:	9514532
Lot Facility:	TEST
Publicly Supplied:	<input type="checkbox"/> Y
Vaccinator:	--select--
Facility:	--select--
Anatomical Site:	--select--
Volume (CC):	
VFC Status:	Patient is not VFC Eligible.
District/Region:	
VIS Publications Dates:	1. <input type="text"/> 2. <input type="text"/> 3. <input type="text"/> 4. <input type="text"/>
Date VIS Form Given:	09/28/2005
Comments:	<input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

8. Some of the fields are automatically filled in from the "Vaccination View/Add" window. For a list of fields and their descriptions, refer to Table 10-2: Vaccination Detail Add/Edit Fields. The fields already filled in from the "Vaccination View/Add" window are:
  - Vaccine Name
  - Date Administered



- Historical = NO
- VFC Status
- Date VIS Form Given (uses the "Date Administered date")

**Note:** When necessary, you can change the **DATE ADMINISTERED** and select **HISTORICAL** on this window.

9. For the **MANUFACTURER**, **LOT NUMBER**, **LOT FACILITY**, and **PUBLICLY SUPPLIED** fields, either click the "Click to Select" hyperlink or click in any of the four fields. The "Select Lot Number" window appears.

Figure 10-6: Select Lot Number

Select	Manufacturer	Lot Number	Facility	Pub. Supplied	Expiration Date	Doses Available
-->	ABBOT	65421	STC	Y	01/01/2008	99

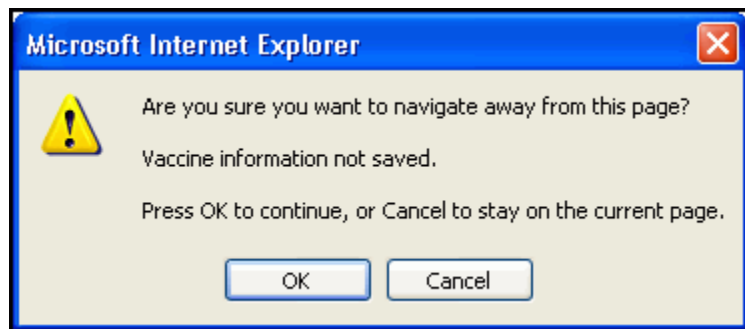
- Click the **SELECT ARROW** by the desired **LOT**. Your selection data will automatically populate the **MANUFACTURER**, **LOT NUMBER**, **LOT FACILITY**, and **PUBLICLY SUPPLIED** fields.
10. Verify the **VACCINATOR** name is correct. Click on the drop-down arrow to view a list of valid choices.
  11. Click the drop-down arrow to choose a **FACILITY** (name of the facility that administered the shot).
  12. In the **ANATOMICAL SITE** field, it may already be filled in if this field was set to automatically fill via the Personal Settings option. If the field isn't automatically filled in, click the drop-down arrow to choose the **ANATOMICAL SITE**.

**Note:** This is a setting that is set in Personal Settings to allow for an (optional) "minimum and maximum age." This field may already be filled in.



13. If desired, type the **DISTRICT/REGION** number.
14. If desired, type any **COMMENTS** regarding the **vaccine**.
15. Click on one of the available buttons:
  - **SAVE** – to save your new entries and return to the "Vaccination View/Add" window.
    - a) A state configurable option can be set to display an error message if you attempt to add a vaccination and leave the window without saving.

Figure 10-7: Vaccine Information Not Saved



- b) Click **OK** to cancel the vaccine administration and display the chosen menu/option. Click **CANCEL** to stay on the current page to **SAVE** the data.
- **CANCEL** – to NOT save and return to the "Vaccination View/Add" window.

## EDITING A VACCINATION RECORD

Your user access determines whether you can edit or delete vaccination information, so you may not see the same edit and delete buttons at the bottom of the window.

**Note:** Only the vaccinations administered within your IRMS can be edited or deleted.

1. From the "Vaccination Detail" window, press the **EDIT RECORD** button. The "Vaccination Detail Edit" window appears.



Figure 10-8: Vaccination Detail Edit

Patient			
Name:	JOHN DOE	SIIS Patient ID:	1
Date of Birth:	01/01/2001	Age:	226 weeks, 52 months, 4 yrs
Guardian:	MARY	Status:	Active

Vaccination Detail Edit	
<b>Vaccine:</b>	Pneumococcal(PCV7)
<b>Date Administered:</b>	07/01/2001
Historical:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Manufacturer:	<input type="text"/> <a href="#">Click to select</a>
Lot Number:	<input type="text"/>
Lot Facility:	<input type="text"/>
Publicly Supplied:	<input type="text"/>
Vaccinator:	--select--
Facility:	--select--
Anatomical Site:	--select--
Volume (CC):	<input type="text"/>
VFC Status:	Patient is not VFC Eligible.
District/Region:	<input type="text"/>
VIS Publications Dates:	1. <input type="text"/> 2. <input type="text"/> 3. <input type="text"/> 4. <input type="text"/>
Date VIS Form Given:	<input type="text"/>
Comments:	<input type="text"/>

2. Refer Table 10-2: Vaccination Detail Add/Edit Fields for a list of fields and descriptions.
3. Make the necessary changes and press one of the buttons:
  - **SUBMIT CHANGES** to save editing changes and return to the "Vaccination Detail" window.
  - **CANCEL** to NOT save and return to the "Vaccination View/Add" window.
  - **RESET VALUES** to erase your newly entered data from the fields and drop-down menus, redisplay the window how it was previously, and remain on the same window.

## DELETING A VACCINATION RECORD

If your user access level allows you to edit and delete vaccination information, there will be two buttons at the bottom of the window.

When deleting vaccinations, the application will not use the facility listed on the vaccination to determine ownership—the user's facility will be used. If a facility does not exist, the vaccinating facility listed in the Personal Settings will be used. If the facility is



not set up as a default in Personal Settings, then a pop-up box of facilities will appear and ask you to select the "deleting facility." This ensures that the patient ownership remains the same if vaccinations from a different facility are deleted.

**Note:** Only the vaccinations (administered and historical) of the IRMS that entered them can be edited or deleted.

Once a vaccination record has been deleted, you cannot un-delete.

1. From the "Vaccination View/Add" window, point and click on the vaccine of the **Vaccination Date** you want to delete. The "Vaccination Detail" window appears.
2. Point and click the **DELETE RECORD** button. A warning message appears at the bottom of the window, and a new field, "**Deleting Facility**" appears.

Figure 10-9: Vaccination Detail – Delete Record – Warning Message

CancelDelete Record

If you are sure you wish to delete this vaccination, click 'Delete'.  
If you do not want to delete this vaccination, press 'Cancel'.

3. Point and click the drop-down arrow to select the **DELETING FACILITY** and click the **DELETE RECORD** button again. The "Vaccination View/Add" window reappears with a confirmation message (at the top of the window) that the Vaccination was deleted.

Figure 10-10: Vaccination View/Add – Vaccination Deleted

Vaccination Deleted

Vaccination View/Add

(historicals marked by \*, adverse reaction marked by #)

Facility where vaccines documented: --select--

Vaccine	1	2	3	4	5
DTaP	03/24/2001	05/24/2001	07/24/2001	01/24/2002 *	
Td (Adult)					
IPV					
Hib--unspecified					
Hep B/Hib					

## ADDING HISTORICAL VACCINATIONS

Historical shots are shots that are not administered by the facility or vaccinator entering the vaccination information.



More than one vaccination from the same vaccine family cannot be entered on the same date. If you attempt to do so, an error message appears.

To add a historical vaccination, perform the following:

1. From the **PATIENT** menu, point and click **SEARCH (/ADD)** and perform a **Patient Search**.
2. Point and click the **SELECT ARROW** to select the desired patient whose vaccinations you want to view. The "Patient Demographics" window appears.
3. Click the **VACCINATION VIEW/ADD** menu option. The patient's "Vaccination View/Add" window appears.
4. Verify the **FACILITY** name is correct. Click on the drop-down arrow to view a list of valid choices.
5. Locate the **VACCINE NAME** and **DOSE NUMBER**. If you don't see it in the "short cut" section, click on an available down-arrow for the full name at the bottom of the window.
6. Double-click the field to insert the "Default Date" or type the date using the format mmddyyyy.
7. Click the **ADD HISTORICAL** button. The vaccination data is entered and you remain on the "Vaccination View/Add" window.

## ADDING SMALLPOX VACCINATION HISTORY

To add smallpox vaccination history, perform the following:

1. From the **PATIENT** menu, point and click **SEARCH (/ADD)** and perform a **Patient Search**.
2. Point and click the **SELECT ARROW** to select the desired patient whose vaccinations you want to view. The "Patient Demographics" window appears.
3. Click the **VACCINATION VIEW/ADD** menu option. The patient's "Vaccination View/Add" window appears.

**Note:** If the patient was born in 1990 or later, the **SMALLPOX HISTORY** button will be disabled on the "Vaccination View/Add" window.



4. Click on the **ADD SMALLPOX HISTORY** button. The "Smallpox Vaccination History" window appears.

Figure 10-11: Smallpox Vaccination Add

Patient	
Name:	BOB BARKER
Date of Birth:	01/01/1935
Previous Smallpox Vaccination Add	
Facility where history documented:	--select--
Smallpox Vaccination History	
<input checked="" type="radio"/> Patient received vaccination in childhood	
<input type="radio"/> Patient received vaccination in adulthood	
<input type="radio"/> Patient received vaccination and remembers date: <input type="text"/>	
<input type="radio"/> Patient received vaccination and has a documented date: <input type="text"/>	
<div>Cancel    Add History Now</div>	

5. Click the drop-down arrow and select the facility for the **FACILITY WHERE HISTORY DOCUMENTED** field.
6. Click one of the following radio buttons:

- **Patient received vaccination in childhood** – doesn't have a date.

**Note:** Since there isn't a date, the date of vaccination will show as "unknown" on the vaccination windows and in the reports.

- **Patient received vaccination in adulthood** – doesn't have a date.

**Note:** When there isn't a date, the date of vaccination will show as "unknown" on the vaccination windows and in the reports.

- **Patient received vaccination and remembers date** – type the date using the MM/DD/YYYY format.
- **Patient received vaccination and has a documented date** – type the date using the MM/DD/YYYY format.

7. Click one of the available buttons:
  - **ADD HISTORY NOW** button to save the entry.
  - **CANCEL** to NOT add the History.



The "Vaccination View/Add" window reappears.

## ADDING CONTRAINDICATIONS

In some states such as Idaho, contraindication recording is not available because it is considered a "violation of privacy." To prevent patients who "opt-out" of a specific vaccine from being forecasted and showing up on the Reminder Recall list, on the "Contraindication" window, the message "Parent or Patient Refusal: Personal" or "Laboratory Evidence of Immunity" will appear versus the actual Contraindication text.

**Note:** When adding or deleting contraindications, the patient's forecast will update immediately.

When adding contraindications, the chosen vaccine determines the valid reasons that will display.

In addition, CASA assesses coverage levels only. Permanent contraindications and refusals will be assessed as "incomplete coverage" for the specific antigen.

1. From the **PATIENT** menu, point and click **SEARCH (/ADD)**.
2. Perform a Patient Search.
3. Point and click the **SELECT ARROW** to select the desired patient whose vaccinations you want to view. The "Patient Demographics" window appears.
4. Click the **VACCINATION VIEW/ADD** menu option. The patient's "View/Add Vaccination" window appears.
5. Click on the **ADD CONTRAINDICATIONS** button. The "Add Contraindication" window appears.

Figure 10-12: Add Contraindication

Vaccine Contraindications		
Vaccine	Contraindication	Permanent
Add Contraindication		
Facility where documented:	--select--	
Vaccine:	--select--	
Contraindication:		<a href="#">Click to select</a>
Permanent	<input type="checkbox"/>	
		<input type="button" value="Cancel"/> <input type="button" value="Clear"/> <input type="button" value="Add Contraindication"/>



**Note:** If there are other Vaccine Contraindications, they will be listed at the top of the window.

6. Point and click on the drop-down arrow to select **FACILITY**, if necessary.
7. Click on the drop-down arrow to view a list of **VACCINES** and select the vaccine.

**Note:** Different contraindication reasons display per vaccine chosen.

8. Click the "**Click to Select**" hyperlink or click in the Contraindication field to display the dialog box.

Figure 10-13: Select Contraindication

9. On the "Select Contraindication" window, click on the drop-down menu to view a list of valid choices, click on one to highlight it, and then press one the buttons:
  - **SELECT** button to select the contraindication and return to the "Add Contraindication" window with your added contraindication.

Figure 10-14: Vaccine Contraindication Added

Vaccine Contraindications			
Vaccine	Contraindication	Permanent	
DTaP	Precaution: Persistent crying lasting >= 3 hours within 48 hours of prev. dose		<a href="#">delete</a>

Add Contraindication			
Facility where documented:	--select--		
<b>Vaccine:</b>	--select--		
<b>Contraindication:</b>			<a href="#">Click to select</a>
Permanent	<input type="checkbox"/>		
		<a href="#">Cancel</a>	<a href="#">Clear</a>
		<a href="#">Add Contraindication</a>	



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**Note:** Once the contraindication is at the top of the window, you have the opportunity to delete it by pressing the corresponding **DELETE** button.

- **CANCEL** to NOT make a selection.
- **CLEAR** to reset and NOT make a selection. Regardless of the button clicked, the "Add Contraindication" window reappears.

10. Click the **PERMANENT** checkbox if the contraindication is to be kept permanently.

**Note:** If a contraindication is marked permanent, the vaccine will no longer be included in the patient's forecast.

11. Click on one of the buttons:

- **CLEAR** to erase any newly selected/entered text and remain on the window.
- **ADD CONTRAINDICATION** button to add another contraindication.
- **CANCEL** to return to the "Vaccination View/Add" window.



Figure 10-15: Vaccination View/Add with displayed Contraindication

Vaccination View/Add

This patient has one or more contraindications.

(historicals marked by \*, adverse reaction marked by #)

Facility where vaccines documented: --select--

Vaccine	1	2	3	4	5
DTaP	03/24/2001	05/24/2001	07/24/2001	01/24/2002 *	
Td (Adult)					
IPV					
Hib--unspecified					
Hep B/Hib					
Hep B Ped/Adol - Preserv Free					
Pneumococcal(PCV7)					
MMR					
Varicella					
--select--					
--select--					
--select--					

Double-click in any date field above to enter the default date: 03/26/2004

Vaccinations outside the ACIP schedule are marked with an X.

Vaccinations administered or recorded in your facility are displayed in blue.

Add Administered

Add Smallpox History

Add Historicals

Clear All

Contraindications

## ADDING A VACCINE DEFERRAL

This option is accessed from the "Vaccination View/Add" window by clicking the **DEFERRALS** button. Adding a Vaccine Deferral will impact Reminder Recall. If a patient isn't forecast to receive the vaccine, they won't get a reminder recall for it. A report is available to retrieve all deferrals.

**Note:** If the patient receives an administered vaccination in the family of the shot that was deferred, the deferral is automatically removed. If an administered vaccination matches a historical vaccination, the deferral is left in place.

1. From the "Vaccination View/Add" window, click the **DEFERRALS** button. The "Vaccine Deferrals" window appears.



Figure 10-16: Vaccine Deferrals

Vaccine Deferrals		
Vaccine	Dose	Date
<b>Add Vaccine Deferral</b>		
<b>Vaccine:</b>	--select--	
<b>Dose Number</b>		
<b>Facility where documented:</b>	--select--	
<input type="button" value="Cancel"/> <input type="button" value="Reset"/> <input type="button" value="Add Vaccine Deferral"/>		

2. In the **VACCINE** field, click the drop-down menu arrow to view/select a valid choice. This is a required entry.
3. In the **DOSE NUMBER** field, type the dose number. This is a required entry.
4. In the **FACILITY WHERE DOCUMENTED** field, click the drop-down menu arrow to select the Facility.
5. Click one of the available buttons:
  - **ADD VACCINE DEFFERAL** – to add the deferral. A red confirmation message appears at the top of the window and the vaccine will also be copied to the top of the Window.
  - **CANCEL** – to not save the deferral and exit to the "Vaccination View/Add" window.
  - **RESET** – to erase any selected/typed data and remain on the window to enter new selections.
  - **DELETE** – only appears when a vaccine deferral exists. Locate the deferral you want to delete and click the **DELETE** button located to the right on the same row. A red confirmation message appears at the top of the window.

## ADDING/REMOVING CHICKENPOX HISTORY

This button is an option and is state configurable. It is used to record whether the patient has had the chickenpox disease. Once the patient has had the chickenpox, the Varicella vaccination will not get forecasted. A new vaccination code "ChickenPox – Had Disease" will also appear.

When configured and the ADD button has been pressed, the message, "The patient was reported to have had the chickenpox



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disease" appears directly under the "Vaccination View/Add" window's title bar. Once added, the **REMOVE CHICKENPOX HISTORY** button appears.

This option of having this information be public versus private is also state configurable.

## VACCINATION FORECAST

The **Vaccination Forecast** option is used to view the shots that will be due for a specific patient (including invalid doses), their recommended dates, and their status. An example of an invalid dose is as follows: If there is a 6-month interval between DtaP doses 4 and 5, and dose 5 is given too early, it is counted as invalid. The forecasting would still show the recommended date for dose 5 as 6 months from Dose 4. The recommended date should show Dose 5 recommended 6 months from the invalid dose 5.

**Note:** Optionally, your state may choose to setup the configuration where the forecast procedure may suppress Dose 1 for HepA. This is done within the actual database.

A state configurable option can be set to NOT forecast a specific vaccine unless the first dose has been given.

Forecasting will reflect the following situations and are illustrated in the following table:

- If a patient received single antigens of Measles, Mumps and Rubella, the forecast does not show them in need of another MMR.
- If they do not receive all 3 components of the vaccine, they should still be recalled for an MMR or if they are due for a 2nd MMR, they should still be recalled for an MMR.
- If a patient receives the single antigen vaccines, they should appear on the Universal Certificate and the Vaccination Summary, Vaccination View/Add screen print, Patient Record Summary, and Patient Record.



Table 10-3: Forecasting Recall Examples

VACCINATIONS	FORECAST					NOTES
	MM R1	MMR 2	MEASLE S2	MUMPS 2	RUBELL A2	
NO VACCINATIONS	X					Single antigens are not forecasted until the patient receives the first dose of a single antigen.
MMR1	X					Single antigens are not forecasted until the patient receives the first dose of a single antigen.
MEASLES1	X		X			Mumps and Rubella are not displayed since the patient has not received any of those antigens.
MEASLES 2	X					The Measles is complete so it no longer shows in the forecasting. However, MMR #1 is still not satisfied so it remains in forecasting. Mumps and Rubella are not displayed since the patient has not yet received any of those antigens.
MEASLES 1, MUMPS 1, RUBELLA 1		X	X	X	X	
MEASLES 1, MUMPS 1, RUBELLA 1, MMR1						All of the intervals for two doses can be met, then the MMR series is complete and all of the vaccines are removed from forecasting.

The vaccinations chosen in the **SETTINGS | FORECAST** option, determines the vaccines that will display in the patient's forecast. This is a global setting and the same vaccinations will display for every patient.

There are two types of schedules—regular and accelerated. Based on the patient's existing vaccinations, the application will automatically switch between the schedules to get the child up to date, as recommended by the CDC.



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**Note:** Although state specific, there are laws (Louisiana and Washington) that state in order for a child to get into school, a child must receive an IPV on or after their 4th birthday—regardless if they already meet the 4 IPV's according to the ACIP schedule. A 4th dose given prior to 4 years of age should show as invalid.

1. From the **PATIENT** menu, point and click **SEARCH (/ADD)** and perform a **Patient Search**.
2. Point and click the **SELECT ARROW** to select the desired patient whose vaccinations you want to view. The "Patient Demographics" window appears.
3. Click the **VACCINATION FORECAST** menu option. The patient's "Vaccination Forecast" window appears.



Figure 10-17: Vaccination Forecast

Patient				
Name:	JOHN DOE	SIIS Patient ID:	3	
Date of Birth:	06/03/1960	Age:	44 yrs	
Guardian:	MARY	Status:	Active	
Vaccination Forecast				
The forecast automatically switches to the accelerated schedule when a patient is behind schedule.				
Vaccine Family	Dose	Recommended Date	Minimum Valid Date	Status
HEP-B 3 DOSE**	1	06/03/1960	06/03/1960	Past Due
DTaP/DT/Td*	1	08/03/1960	07/15/1960	Past Due
POLIO	1	08/03/1960	07/15/1960	Past Due
FLU	1	12/03/1960	12/03/1960	Past Due
MMR	1	06/03/1961	06/03/1961	Past Due
VARICELLA	1	06/03/1961	06/03/1961	Past Due
HEP-A	1	06/03/1962	06/03/1962	Past Due
MENINGOCOCCAL	1	06/03/1971	06/03/1971	Past Due
<p>* DTaP or DT should be given to patients under 7 years old. Td should be given to patients 7 years old or older.</p> <p>** If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.</p> <p><b>Due Now</b> -- As of today's date, the patient's age falls between the recommended minimum age and the recommended maximum age for this dose and the absolute minimum interval has been met since the last dose.</p> <p><b>Past Due</b> -- As of today's date, the recommended maximum age or the recommended maximum date for this dose has passed.</p> <p><b>Up to Date</b> -- As of today's date, the patient is not due or past due.</p>				

**Note:** If a contraindication is marked permanent, the vaccine will no longer be included in the patient's forecast.

## VACCINATION SUMMARY

The **Vaccination Summary** option groups vaccinations by vaccine family and is used to view the vaccination series or single antigens of Measles, Mumps, and Rubella completion. An example of a series is DTaP/DTP/DT/Td.

**Note:** All childhood vaccines will display on the Vaccination Summary.

If a patient receives the single antigen vaccines, they will appear in various places, such as the Universal Certificate and the Vaccination Summary, Vaccination View/Add screen print, Patient Record Summary and Patient Record.



It can also be used as a printable report for a patient's vaccinations.

**Note:** As an option, the Forecast could display on this window and is configurable by the state. Refer to the previous section for an explanation regarding Forecast information. Additionally, Vaccine Deferrals and Contraindications could display on this window and are state configurable.

1. From the **PATIENT** menu, point and click **SEARCH (/ADD)** and perform a **Patient Search**.
2. Point and click the **SELECT ARROW** to select the desired patient whose vaccinations you want to view. The "Patient Demographics" window appears.
3. Click the **VACCINATION SUMMARY** menu option. The patient's "Vaccination Summary" window appears.

Figure 10-18: Vaccination Summary

Patient									
Name:	JOHN DOE	SIIS Patient ID:	1						
Date of Birth:	01/01/2001	Age:	247 weeks, 56 months, 4 yrs						
Guardian:	MARY	Status:	Active						
Vaccination Summary									
Does not include all vaccination types.									
Vaccinations outside the ACIP schedule are marked with an 'X'.									
Vaccine Family	1	2	3	4	5	6	7	8	
DTaP/DTP/DT/Td	03/01/2001	05/01/2001	07/01/2001	01/01/2002					
OPV/IPV	03/01/2001								
MMR	01/01/2002								
Hib	03/01/2001	05/01/2001	07/01/2001						
Hep B - 3 Dose	01/01/2001								
Varicella	01/01/2002								
Pneumo (PCV7)	03/01/2001	05/01/2001	07/01/2001						
Vaccine Deferrals									
Vaccine	Dose			Date					
Vaccine Contraindications									
Vaccine	Contraindication		Permanent		Unverified				

**Note:** A “state configurable” option is available that allows the “Invalid Vaccination Reason(s)” to display on the Vaccination Detail and Vaccination Summary windows.



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## 11 CASA EXPORT

The **CASA Export** menu is used to conduct immunization assessments by exporting a file that will be used by a Windows version of the Clinic Assessment Software Application (WinCASA). WinCASA, also referred to as CASA, is a separate software package that has been developed by the Centers for Disease Control and Prevention to assess immunization coverage rates in a standard manner.

Providers are to conduct semi-annual audits (stated by the Standards for Pediatric Immunization Practices) to assess immunization coverage levels and review immunization records in the patient populations they serve. In both public and private sectors, the assessment of immunization services for pre-school age patients should include audits of immunization records, or inspection of a random sample of records to determine the immunization coverage level. The assessment results should be discussed by providers as part of their ongoing quality assurance reviews, and be used to develop solutions to the problems identified.

The primary purpose of **CASA** is to help providers implement this recommended practice. CASA can also be used to collect information on all clinical encounters in order to assess if providers utilize all clinical encounters to screen for needed vaccines and when indicated, immunize children.

### PERFORMING THE CASA EXPORT

Exporting **CASA** data requires two steps. The first step is using the IWEB application to retrieve the data and place it into a text file in alphabetical order. The second step is running the CASA application to import the data file.

Exports will export all of the vaccine types, dose numbers, and chickenpox history accepted into CASA. The CASA template for CDC's CASA software has been modified and submitted to the CDC for inclusion in their distribution of CASA software.



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The IWeb Casa Export includes VFC Eligibility and thus, the Import Template includes VFC Eligibility.

Version 3.0 includes exporting chickenpox history to CASA.

**Note:** Vaccinations for patients who "opt out" or are exempt from the registry, will be included in the central registry for inventory and CASA purposes.

## STEP 1 (IWEB APPLICATION): RETRIEVING DATA

To retrieve the export data, perform the following:

1. Point and click on the **CASA Export** menu. The "Export to CASA" window appears.

**Note:** Your user access determines the options you will see on this window.



Figure 11-1: Export to CASA

Export to CASA	
Patient Status	<input checked="" type="radio"/> Active Only <input type="radio"/> Inactive Only <input type="radio"/> All
Patient Birth Date Range	From: <input type="text"/> To: <input type="text"/>
Limit Export by:	
<input checked="" type="radio"/> IRMS	1000-CLIENT_SERVER_INTERNAL_IRMS_ID ▼
<input type="radio"/> Do Not Limit	
<input type="radio"/> Facility	--select-- ▼
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> Primary Care Physician	--select-- ▼
<input type="checkbox"/> Vaccinator	--select-- ▼
<input type="checkbox"/> Program	--select-- ▼
<input type="checkbox"/> Health Plan	--select-- ▼
<input type="checkbox"/> State	--select-- ▼
<input type="checkbox"/> County/Parish	--select-- ▼
<input type="checkbox"/> ZIP Code	<input type="text"/>
<input type="checkbox"/> District/Region	<input type="text"/>
Output Type: <input checked="" type="radio"/> Text File (Download) <input type="radio"/> Text File (Server Job) <input type="radio"/> HTML (Text Area)	
<div>Clear Create Export File</div> <div>View Export Log</div>	

2. The fields and their descriptions are listed in the table.

Table 11-1: Casa Export Fields

FIELD	DESCRIPTION
PATIENT STATUS	Status of the patient. Statuses are: <ul style="list-style-type: none"><li><b>ACTIVE ONLY</b> – selects only patients that are active in the application.</li><li><b>INACTIVE ONLY</b> – select only those patients that have been inactivated in the application.</li><li><b>ALL</b> – selects active and inactive patients.</li></ul>
PATIENT BIRTH DATE RANGE	Type the <b>BIRTH DATE RANGE</b> for the patients to include. Type the dates in the <b>MM/DD/YYYY</b> format. You must enter a FROM and TO date.



FIELD	DESCRIPTION
<b>LIMIT EXPORTS BY</b>	To limit the amount of data to export, use the drop-down arrows, radio buttons, or type text into the fields.
<b>IRMS / DO NOT LIMIT</b>	To export a specific IRMS, select the IRMS using the drop-down arrow; otherwise, select the Do Not Limit radio button to export all IRMSs.
<b>FACILITY / DO NOT LIMIT</b>	If you have several facilities, you can isolate the patients that belong to a specific facility. Point and click on the drop-down arrow to view a list of facilities. Point and click on the desired Facility, and then click the FACILITY radio button; otherwise, select the Do Not Limit radio button to select all the facilities.
<b>PRIMARY CARE PHYSICIAN</b>	Point and click on the drop-down arrow to view a list of Physicians. Point and click on the desired PHYSICIAN. The checkbox will automatically get checked after you make a selection.
<b>VACCINATOR</b>	Point and click on the drop-down arrow to view a list of Vaccinators. Point and click on the desired VACCINATOR. The checkbox will automatically get checked after you make a selection.
<b>PROGRAM</b>	Point and click on the drop-down arrow to view a list of Programs. Point and click on the desired PROGRAM. The checkbox will automatically get checked after you make a selection.
<b>HEALTH PLAN</b>	Point and click on the drop-down arrow to view a list of Health Plans. Point and click on the desired HEALTH PLAN. The checkbox will automatically get checked after you make a selection.
<b>STATE</b>	Point and click on the drop-down arrow to view a list of States. Point and click on the desired STATE. The checkbox will automatically get checked after you make a selection.  Select State before selecting County/Parish.
<b>COUNTY/PARISH</b>	Point and click on the drop-down arrow to view a list of Counties/Parishes. Point and click on the desired COUNTY/PARISH. The checkbox will automatically be checked after you make a selection.



FIELD	DESCRIPTION
	<b>Note:</b> You must select STATE before selecting COUNTY/PARISH.
<b>ZIP CODE</b>	Type either a 5-digit (85024) or 9-digit (85024-1234) ZIP CODE. The checkbox will automatically get checked after you begin to type.
<b>DISTRICT/REGION</b>	Type a whole number for the DISTRICT/REGION. The checkbox will automatically get checked after you begin to type.
<b>OUTPUT TYPE</b>	Select the end result for the export—this is known as OUTPUT TYPE (The number of patient and vaccination records will appear after the file has been written. Output Types are: <ul style="list-style-type: none"><li>• <b>Text File (Download)</b> – Useful to use when you are ready to export the file for importation to CASA.</li><li>• <b>Text File (Server Job)</b> – Useful to use when you want to process the job in the background. When the file is ready, it can be downloaded from the CASA log window. To view JOBS that are currently waiting or being processed, refer to the chapter titled, "Job Queue."</li><li>• <b>HTML (Text Area)</b> – Useful to use when you want to copy/paste into a different application, such as Microsoft Excel.</li></ul>

3. Click one of the available buttons:

- **CLEAR** – to erase any selections made on the window and remain on the window to re-enter selections.
- **CREATE EXPORT FILE** – to begin the export. Continue to step 4.
  - a) If you chose the Output Type of Text File (Server Job), a message will appear at the top of the window.



Figure 11-2: Text File Server Job Confirmation Message

Your CASA Export has been added to the Job Queue.  
Please check View Export Log to download the file when it has completed.

- b) Continue to the section titled, "Viewing the Job Queue."
  - **VIEW EXPORT LOG** – to download the Text File Server Job when it has completed. Continue to the section titled, "Viewing the Export Log."
4. Point and click on the **CREATE EXPORT FILE** button. Depending on the factors entered and number of records to retrieve, this may take a few minutes.

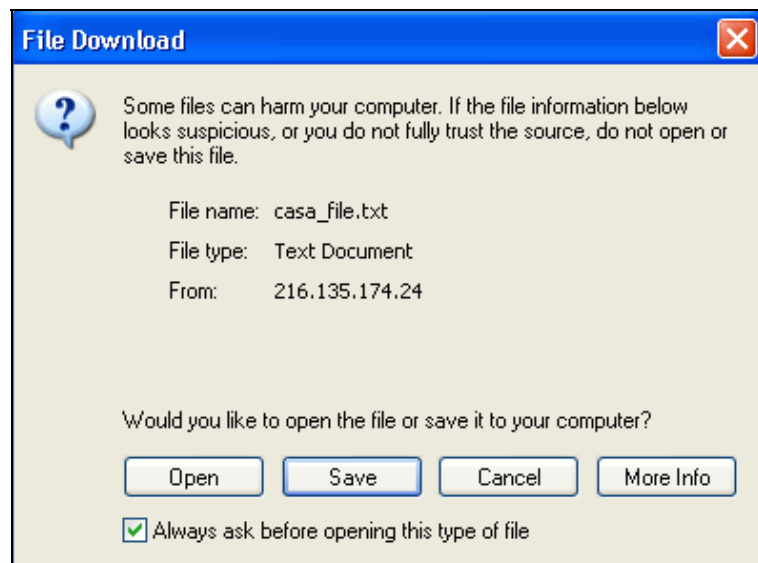
**Note:** Observe the message and completion indicator at the bottom of the window and wait until the indicator stops.

Figure 11-3: Status Indicator



5. A "File Download" dialog window appears.

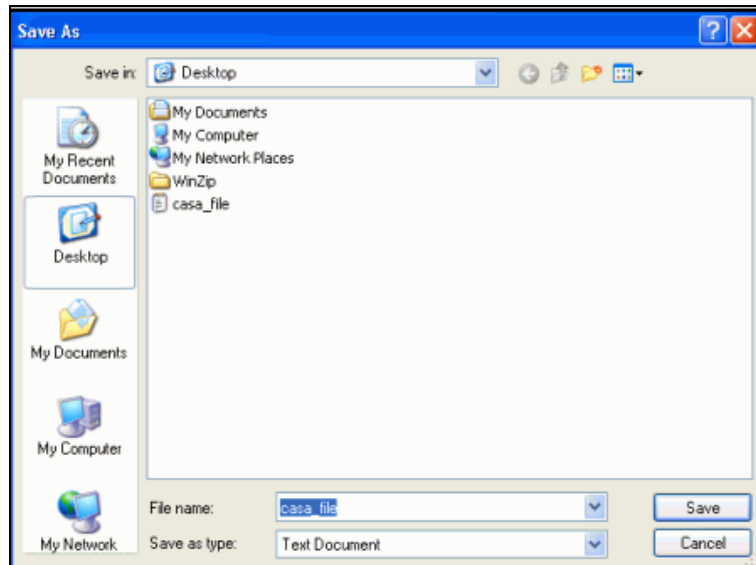
Figure 11-4: File Download Dialog Box



6. Click the **SAVE** button. The "SAVE AS" dialog box appears for you to enter a filename.



Figure 11-5: File Save As Dialog Box

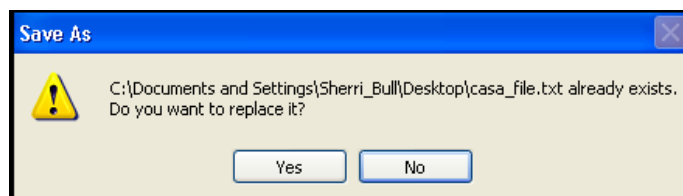


7. The default file name is "**casa\_file**" and it will be saved to the **Desktop** location unless you choose a different directory location.

**Note:** You will need to know the file name and location when you start the CASA application program (step 2).

- You can either accept this file name and location by pressing the **SAVE** button, or if you have a need to save these files, add onto the file name by typing the date and save it to a pre-defined directory. For example, casa\_file 11012001.
- If you accept the filename and location and you have saved a file to your desktop previously, you will see another dialog box.

Figure 11-6: Replacement File Dialog Box

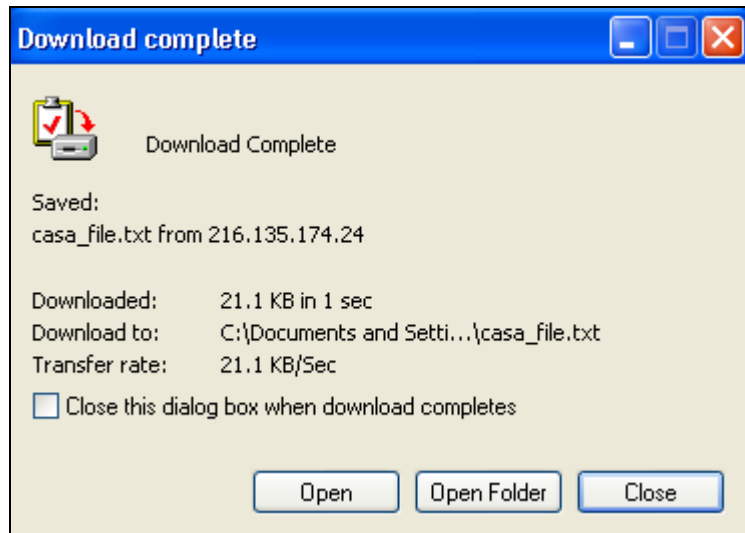


**Note:** Observe the directory path because you will need it for Step 2.



8. Click the **YES** button (to erase the previous file and save the new file in its place). A confirmation dialog window appears.

Figure 11-7: Download Complete Dialog Box



9. Click the **CLOSE** button.

## VIEWING THE EXPORT LOG

After the data has been retrieved, the export log can be viewed, by performing the following:

1. Click the **VIEW EXPORT LOG**. The "CASA Export Log" window appears:

Figure 11-8: CASA Export Log

CASA Export Log					
Export Date	From Birthday	To Birthday	Limited To	Records Sent	Export Filename
05/27/2005	01/01/2000	01/01/2005		1	<a href="#">(Server Job) casa-1117208337656.txt</a>
05/27/2005	01/01/2000	01/01/2001		1	<a href="#">casa_file</a>
05/27/2005	01/01/2000	01/01/2001		1	<a href="#">(Server Job) casa-1117208391875.txt</a>
					<a href="#">Back</a>

2. Click on the **EXPORT FILENAME** to view the contents of the file, or click the **BACK** button to return to the "Export to CASA" window.

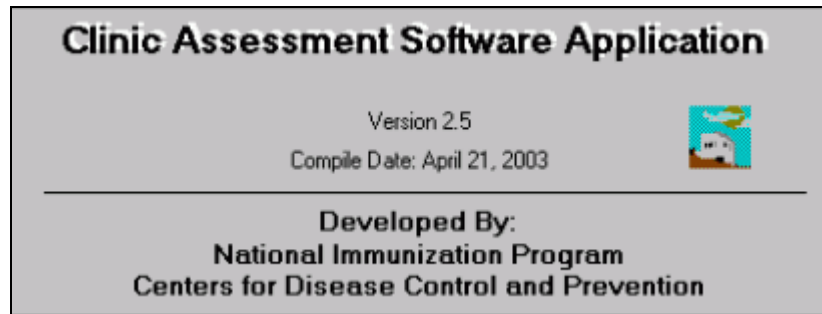


## STEP 2 (CASA APPLICATION)

These instructions import the **casa\_file.txt** file into CASA.

1. Point and click the **START** button and choose the **PROGRAMS | CASA FOR WINDOWS | CASA FOR WINDOWS** options. The Clinic Assessment Software Application dialog box briefly appears.

Figure 11-9: Casa Software Welcome Window



The dialog box will disappear and then the CASA version menu appears.

Figure 11-10: CASA Version Menu



2. Point and click on the **ASSESSMENT SITE** menu and choose the **IMPORT | IMPORT USING AN EXISTING TEMPLATE** option. The "Choose an Import Template to Import" dialog box appears.



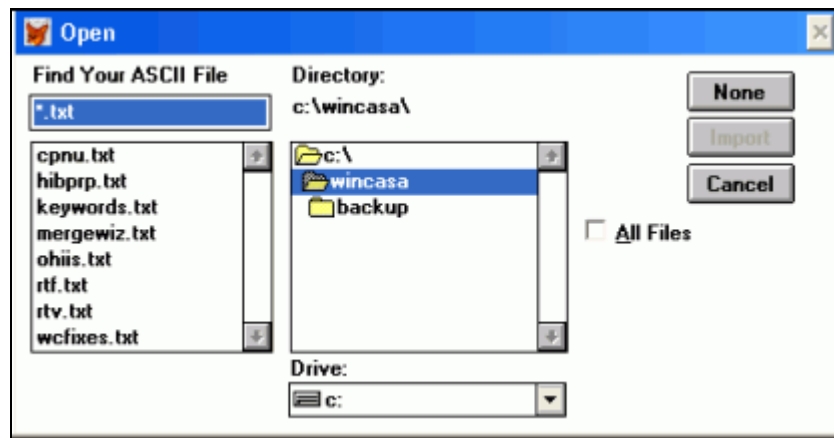


Figure 11-11: Import Template



3. Type the letter **S** to immediately position the highlighter on the **STC IWEB** option, and then click the **OK** button. The "Open – Find your ASCII File" dialog box appears.

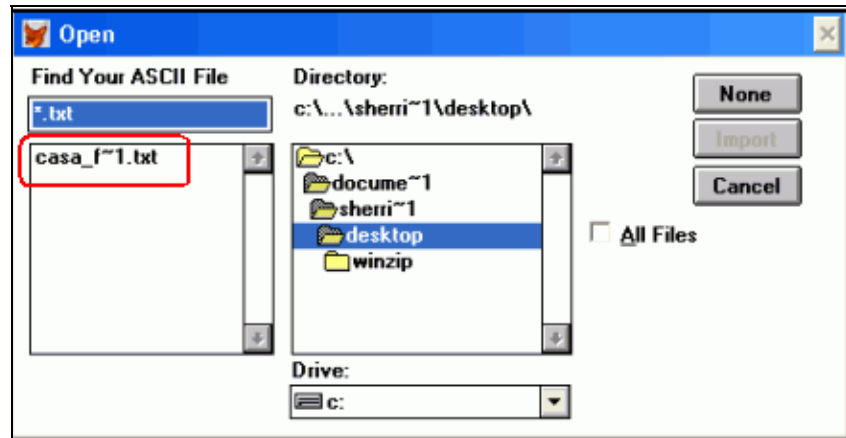
Figure 11-12: Find ASCII File



4. Traverse through the directory paths to locate your text file. For example, point and click on C:\ and then on the directory name below it (Documents & Settings), and then on the next directory (Sherri), and then on the Desktop folder, etc. until you locate your text file.



Figure 11-13: Open ASCII Text File



5. Point and double-click on the file name. For example, **casa\_file.txt**. The "Assessment Site Download" window appears.

Figure 11-14: Assessment Site Download

6. In the "**Name Of Assessed Site**" field, type an identifying name. For example, County Health Department.
  - Use the **TAB** key to get to the next field.



- Once your TAB key is in the "**Provider Type**" field, a pop-up window appears with the following types:

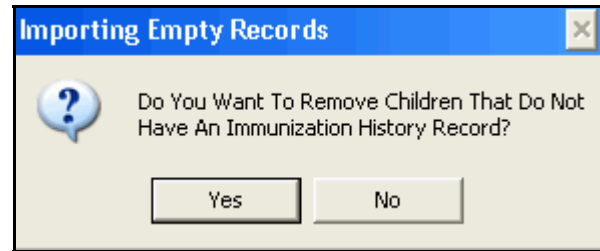
Table 11-2: Provider Types

TYPE	DESCRIPTION
<b>P</b>	Public Health Center
<b>C</b>	Community Health Center
<b>D</b>	Daycare Site
<b>H</b>	Headstart Site
<b>S</b>	Preschool Site
<b>W</b>	WIC Site
<b>I</b>	Indian Health Service
<b>R</b>	Private Provider
<b>O</b>	HMO

- **Assessor's Initials** – must be three initials.
  - **Assessment Date** – defaults to today.
  - **Common Assessment** – defaults to today.
  - **Perform Assessment Range Calculations In** – Point and click in either the **Months** or **Years** checkbox.
  - **From / To** – If months was chosen in the "Perform Assessment Range Calculations In" section, the field will be labeled months; otherwise, years will display.
7. Verify the **From/To** Dates are accurate and change them if necessary.
  8. Click the **OK** button to continue (or click **CANCEL** to stop). An "Importing Empty Records" dialog box appears.

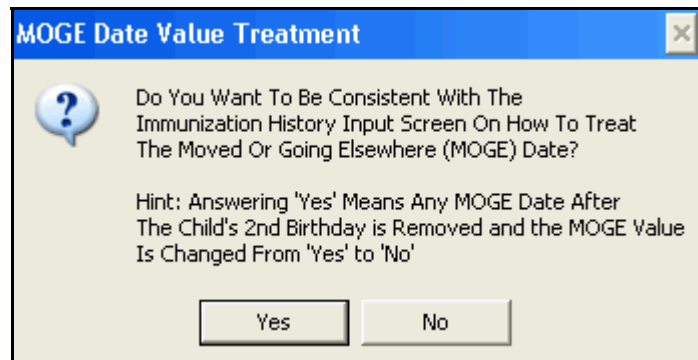


Figure 11-15: Importing Empty Records Dialog Box



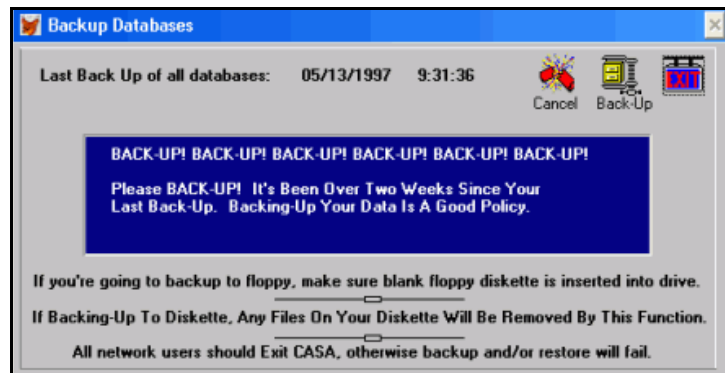
9. Click the **YES** or **NO** button. The "MOGE Date Value Treatment" dialog box appears. MOGE is an acronym for Moved Or Going Elsewhere.

Figure 11-16: MOGE Date Value Treatment



10. Click either the **YES** or **NO** button. You are now finished with this step.
11. Exit the application by pointing and clicking on the **EXIT** menu option. A "Backup Databases" dialog reminder box appears.

Figure 11-17: Backup Databases



12. Perform one of the following:



- **Backup** – Backs up the database. If you are going to perform a **Backup**, you will need a blank formatted diskette inserted into the drive. If the diskette isn't blank, files will be erased.
- **Cancel** – Removes the "Backup Databases" dialog box and remains in the CASA application.
- **EXIT** – Closes the CASA application.

**Note:** For additional information regarding the CASA application, download the user's guide from their web site.

[http://www.cdc.gov/nip/casa/c\\_userguide.htm](http://www.cdc.gov/nip/casa/c_userguide.htm)



## 12 REMINDER RECALL

Reminder Recall is used when you want to notify patients about upcoming or past due vaccinations. Only the patients you own will be included in the Reminder Recall results.

The result of this notification can be any of the following items:

- **Patient Listing Report** – Actual title is, "Reminder Recall Patient Recall Group Listing." This option displays/prints the report criteria, total patients selected, and all patients in order of last name.
- **Mailing Labels** – These require Avery label #5160 and prints in PDF format with three labels across and ten labels down for a total of thirty labels per sheet.
- **Auto Dialer Phone List** – This is a text file that can be saved locally or to a diskette and then sent to the company that is performing the dialing.
- **Postcards** – This is a list of continuous postcards that print on Avery 8387 card stock. Displays/prints two postcards across.

**Note:** Postcards can optionally be customized by the user to accommodate different messages. These custom messages will get stored in the database. More information is available in the section titled, "Selecting the Output Types."

- **Email Reminders** – Lists the patient, guardian, and email addresses of several patients on a list providing the option to send all the emails. Remember to type the facility's return address information.

**Note:** All of these items will first display in a browser window that will provide an option to print.



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Each time the Reminder/Recall is generated, a running total per patient is incremented by one unless you check the box indicating, **"Not to Increment the Recall Count."** There is an additional setting labeled, "Maximum Number of Recall Tries," that holds a numerical value capping the total times a patient is reminded or recalled.

## **RUNNING REMINDER RECALL**

To run Reminder Recall, perform the following steps:

1. Point and click on the **REMINDER RECALL** menu option. The "Reminder/Recall" limitations/selections window appears.



## Reminder Recall

Figure 12-1: Reminder Recall limitations/selections

Reminder/Recall	
<input type="checkbox"/> Do Not Increment Recall Count (Run Recall)	
<input type="checkbox"/> Preview and Select Patients	
<b>Reminder/Recall Date Range:</b>	<b>From:</b> 01/01/1990 <b>To:</b> 11/23/2004
<b>Maximum Recall Tries:</b>	5
<b>Valid Addresses:</b>	<input type="radio"/> Valid Addresses Only <input type="radio"/> Invalid Addresses Only <input checked="" type="radio"/> All Patients
<input type="checkbox"/> Include Inactive Patients	
<b>Limit Reminder/Recall Group By:</b>	
<input type="checkbox"/> Patient Birth Date	From: <input type="text"/> To: <input type="text"/>
<input checked="" type="radio"/> IRMS	--select--
<input checked="" type="radio"/> Do Not Limit	
<input type="radio"/> Facility	--select--
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> Physician	--select--
<input type="checkbox"/> Program	--select--
<input type="checkbox"/> Health Plan	--select--
<input type="checkbox"/> High Risk Category	--select--
<input type="checkbox"/> State	--select--
<input type="checkbox"/> County/Parish:	--select--
<input type="checkbox"/> Zip Code:	<input type="text"/>
<input type="checkbox"/> Health District/Region	<input type="text"/>
<input type="checkbox"/> Appointment Date	From: <input type="text"/> To: <input type="text"/>
<input type="checkbox"/> Deferred Vaccinations Only	
<b>Vaccine Families:</b>	<b>and Optional Needed Dose Number:</b>
<input checked="" type="checkbox"/> DTaP/DT/Td*	<input type="text"/>
<input checked="" type="checkbox"/> HIB	<input type="text"/>
<input checked="" type="checkbox"/> POLIO	<input type="text"/>
<input checked="" type="checkbox"/> HEP-B 3 DOSE**	<input type="text"/>
<input checked="" type="checkbox"/> MMR	<input type="text"/>
<input checked="" type="checkbox"/> VARICELLA	<input type="text"/>
<input checked="" type="checkbox"/> HEP-A	<input type="text"/>
<input checked="" type="checkbox"/> FLU	<input type="text"/>
<input checked="" type="checkbox"/> PNEUMO (PCV7)	<input type="text"/>
<input checked="" type="checkbox"/> HEP-B 2 DOSE**	<input type="text"/>
<input type="checkbox"/> ANTHRAX	<input type="text"/>
<input type="checkbox"/> SMALLPOX SHOT/READING	<input type="text"/>
<p>* DTaP or DT should be given to patients under 7 years old. Td should be given to patients 7 years old or older.</p> <p>** If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.</p>	
<b>Name of Person Running Reminder/Recall:</b> <input type="text"/>	
<input type="button" value="Clear All"/> <input type="button" value="Reset Values"/> <input type="button" value="Run Reminder Recall"/>	



2. Reference the table below for a description/explanation of the item (checkbox, radio button, etc.).

Table 12-1: Reminder Recall Fields

ITEM	DESCRIPTION
<b>DO NOT INCREMENT RECALL COUNT (RUN RECALL)</b>	<p>Ordinarily when Reminder/Recall is run, a "count" gets added to the patient's record. Once the threshold (Maximum Recall Tries) is reached, the patient will no longer receive reminders/recalls.</p> <p>The recall count is reset for a patient once a historical or administered vaccination is entered.</p> <p>If you want to do a "practice" run to view the number of patients that are to be reminded/recalled, you would want to point and click this checkbox to "NOT" add a count; otherwise, leave it UNCHECKED.</p>
<b>PREVIEW AND SELECT PATIENTS</b>	<p>If you want the opportunity to preview and edit (select patients) the final list, point and click the Preview and Select Patients checkbox.</p> <p>The recall count does not get incremented for patients that are removed from the recall list.</p>
<b>REMINDER/RECALL DATE RANGE (FROM AND TO)</b>	<p>The "From" and "To" dates have defaults that can be changed. Point and click the portion of the date you want to change. The date must be entered in MM/DD/YYYY format and both fields <b>MUST</b> have a date.</p> <p>Note: If this is for a <b>REMINDER</b>, enter future date range; otherwise, if this is a <b>RECALL</b>, enter historic date range.</p>
<b>MAXIMUM RECALL TRIES</b>	<p>This is the total times a recall will be sent to a patient that hasn't responded by getting his immunization(s). A default of 5 is automatically selected. Point and click on the drop-down arrow to choose a new value, if desired. The maximum is 20.</p>
<b>VALID ADDRESSES</b>	<p>This is to select only those patients that have:</p> <ul style="list-style-type: none"><li>• Valid Addresses Only</li><li>• Invalid Addresses Only</li><li>• All Patients (Valid and Invalid)</li></ul>



## Reminder Recall

ITEM	DESCRIPTION
<b>INCLUDE INACTIVE PATIENTS</b>	If checked, patients that have been set as "Inactive" will be included in the generated list; otherwise, the inactive patients will not be included.
<b>LIMIT REMINDER/RECALL GROUP BY</b>	Allows you to place limitations on the "checked" items; thus, limiting the data that is to be retrieved.  <b>Note:</b> Registry Client, IRMS Client, and Facility Client access users can use zip code, state, and county filters to limit their recalls.
<b>PATIENT BIRTH DATE (FROM AND TO)</b>	If a FROM and TO date are entered, the checkbox will automatically get checked. Only patient's whose Birth Dates are within the range will be retrieved and included.
<b>IRMS, OR DO NOT LIMIT</b>	As a default, the Do Not Limit radio button will be checked.
<b>FACILITY, FACILITY GROUP, OR DO NOT LIMIT</b>	As a default, the Do Not Limit radio button will be checked.  If you want to generate the list by Facility or Facility Group, point and click on the drop-down menu to see a list. When you make a selection from the list, the radio button will automatically get selected.  <b>Note:</b> If a Facility Display (Abbreviated) Name was entered for the facility, it will appear in the list as opposed to the full name of the facility.
<b>PHYSICIAN</b>	If you want to generate the list for a specific Physician, point and click on the drop-down menu to see a list of Physicians. When you make a selection from the list, the checkbox will automatically get checked.
<b>PROGRAM</b>	If you want to generate the list for a specific Program, point and click on the drop-down menu to see a list of Programs. When you make a selection from the list, the checkbox will automatically get checked.
<b>HEALTH PLAN</b>	If you want to generate the list for a specific Health Plan, point and click on the drop-down menu to see a list of Health Plans. When you make a selection from the list, the checkbox will automatically be checked.



ITEM	DESCRIPTION
<b>HIGH RISK CATEGORY</b>	<p>If you want to generate the list for a specific High Risk Category, point and click on the drop-down menu to see a list. When you make a selection from the list, the checkbox will automatically be checked.</p> <p><b>Note:</b> The High Risk Categories must be defined before this option will appear on the window.</p>
<b>STATE</b>	<p>If you want to generate the list for a specific State, point and click the drop-down menu arrow to view/select from a valid list.</p> <p><b>Note:</b> Registry Client, IRMS Client, and Facility Client access users can use zip code, state, and county filters to limit their recalls.</p>
<b>COUNTY/PARISH</b>	<p>If you want to generate the list for a specific County/Parish, point and click the drop-down menu arrow to view/select from a valid list.</p> <p><b>Note:</b> Registry Client, IRMS Client, and Facility Client access users can use zip code, state, and county filters to limit their recalls.</p>
<b>ZIP CODE</b>	<p>If you want to generate the list for a specific Zip Code, type the zip code in the field.</p> <p><b>Note:</b> Registry Client, IRMS Client, and Facility Client access users can use zip code, state, and county filters to limit their recalls.</p>
<b>HEALTH DISTRICT/REGION</b>	<p>If you want to generate the list for a specific District/Region, point and click in the field and type the number. The checkbox will automatically get checked.</p>
<b>APPOINTMENT DATE (FROM AND TO)</b>	<p>If you want to generate the list for a specific Appointment Date range, point and click and type the FROM date and then press the TAB key to type the TO date. The checkbox will automatically get checked.</p> <p><b>Note:</b> The appointment date must be on the Patient's Demographic record (Next Appt. Date) in order to be retrieved.</p>
<b>DEFERRED VACCINATIONS ONLY</b>	<p>If you want to generate the list for only those patients flagged with "Deferred Vaccinations," click the checkbox.</p>



ITEM	DESCRIPTION
<b>VACCINE FAMILIES AND OPTIONAL NEEDED DOSE NUMBERS:</b>	Allows specific Vaccine Families to be chosen for the Reminder/Recall generation. By default, all of the Vaccine Families are selected (checked).  Optionally, you can type the Dose Number in the field provided to isolate to a specific dose number.
<b>NAME OF PERSON RUNNING REMINDER/RECALL</b>	Type your name here.

3. Verify all your selections have been made and click one of the available buttons:

- **CLEAR ALL** – to erase any newly made selections and remain on the window.
- **RESET VALUES** – to reset the fields to their default values.
- **RUN REMINDER RECALL** – begins the generation and eventually the "Reminder Recall Output Select" window appears.

**Note:** The generation may take a few minutes. There is a status indicator at the bottom of the window. Wait until the indicator is full or has stopped.

Figure 12-2: Status Indicator



Eventually, a dialog box appears indicating the number of patients that were retrieved for the criteria entered.



Figure 12-3: Number of Patients in Recall Group Dialog Box



4. Point and click the **OK** button. The "Reminder/Recall Output Select" window appears with:
- Output Type
  - Search criteria
  - Printer Setup for postcards

**Note:** Due to the size of the window, each section is illustrated separately.

Figure 12-4: Reminder Recall Output Select Window

Reminder/Recall Output Select	
<b>Select</b>	<b>Output Type:</b>
<a href="#">select</a>	Patient Listing
<a href="#">select</a>	Mailing Labels (Avery 5160)
	Postcards (Avery 8387)
	<i>Please enter the Facility Return Address information below:</i>
	Facility Name: <input type="text"/>
	Street: <input type="text"/>
	City, State Zip Code: <input type="text"/>
	Phone Number: <input type="text"/>
<a href="#">select</a> <a href="#">preview</a>	
<a href="#">select</a>	AutoDialer File
	Email Reminders
	<i>Please enter the Facility Return Address information below:</i>
	Facility Name: <input type="text"/>
	Street: <input type="text"/>
	City, State Zip Code: <input type="text"/>
	Phone Number: <input type="text"/>
<a href="#">select</a>	
<a href="#">Return to Reminder Recall Menu</a>	



## Reminder Recall

**Figure 12-5: Reminder Recall Criteria Used**

Reminder/Recall Criteria Used	
Limit By IRMS / IRMS ID	Yes / 1000
Increment Recall Count?	No
Reminder/Recall Date	01/01/1990 to 02/25/2004
Maximum Recall Tries	5
Include Inactive Patients	No
Limit By Patient Birth Date	No /
Range / Patient Birth Range	No /
Limit By Appointment Date Range	No /
Limit By Facility / Facility Name	No /
Limit By Physician / Physician Name	No /
Limit By Program / Program Code	No /
Limit By Health Plan / Health Plan Code	No /
Limit By State / State	No /
Limit By County / County	No /
Limit By ZIP Code / ZIP Code	No /
Limit By Health District/Region / Health District/Region	No /
Person Running Reminder/Recall	
Vaccine Family Codes To Remind/Recall For	DTaP/DT/Td*, FLU, HEP-A, HEP-B 2 DOSE**, HEP-B 3 DOSE**, HIB, MMR, PNEUMO (PCV7), POLIO, VARICELLA

**Figure 12-6: Reminder Recall Print Settings**

Reminder/Recall Print Settings	
Be sure to remove the Header and Footer before printing. To do this configure your browser by selecting File-->Page Setup... from the menu and deleting all text in the Header and Footer text fields.	
Postcards (Avery 8387):	In order for your data to print out with the correct spacing (to fit Avery 8387 postcards), configure your browser by selecting File-->Page Setup... from the menu and setting the margins as follows:
	<p><b>Internet Explorer</b></p> <ul style="list-style-type: none"> <li>• Select Landscape Orientation</li> <li>• top: 0.75"</li> <li>• bottom: 0.25"</li> <li>• left: 0.25"</li> <li>• right: 0.25"</li> </ul>

5. Continue to the next section titled, "Selecting the Output Type."

## SELECTING THE OUTPUT TYPE

The process prior to selecting the output is the same, regardless of the output type. The output will display first providing the option to print/send them.

The various output types may require different setup steps. Perform the following steps based on the output type selected.



Figure 12-7: Selecting the Output Type


Reminder/Recall Output Select	
<b>Select</b>	<b>Output Type:</b>
<a href="#">select</a>	Patient Listing
<a href="#">select</a>	Mailing Labels (Avery 5160)
	Postcards (Avery 8387)
	<i>Please enter the Facility Return Address information below:</i>
	Facility Name: <input type="text"/>
	Street: <input type="text"/>
	City, State Zip Code: <input type="text"/>
	Phone Number: <input type="text"/>
<a href="#">select</a>	AutoDialer File
	Email Reminders
	<i>Please enter the Facility Return Address information below:</i>
	Facility Name: <input type="text"/>
	Street: <input type="text"/>
	City, State Zip Code: <input type="text"/>
	Phone Number: <input type="text"/>
<a href="#">Return to Reminder Recall Menu</a>	

1. Choose the type of output you want to create. The Output Types are listed in the center of the window.
2. Click on the "**select**" hyperlink for the following types; continue to the bulleted list; otherwise, continue to step 3.
  - **Patient Listing** – Displays/prints the report criteria, total patients selected, and all patients in order of last name.
  - **Mailing Labels** (Avery 5160) – Displays/prints three labels across and ten labels down, or a total of thirty labels per sheet.
  - **Auto Dialer File** – Displays a text file that can be saved to your local hard drive or diskette. Instructions for saving the file are:
    - a) Point and right-click inside the text area (inside the blue box).
    - b) Click on **SELECT ALL** to highlight all the lines of the file.
    - c) Click on **COPY** and open up your preferred text editor and open a new file and then choose PASTE.



- d) Then save the file to the preferred directory with the file type of TXT.
- **Emails**—Lists the patient, guardian, and email addresses of several patients on a list providing the option to send all the emails. Remember to type the "facility's return address" information.
  - a) Click either on the **SEND EMAILS** button to send the emails or **CANCEL** to NOT send the emails and return to the "Recall Output – Select" window.
- 3. When running **Postcards**, you can choose to use the default message or you can define your own custom message. Click on either the **SELECT** or **PREVIEW** buttons.
  - **SELECT** – Displays/prints two postcards across with the barcode. Remember to type the facility's return address information.

Figure 12-8: Postcards Output Display

<b>STC</b> 67 E. Weldon Avenue Phoenix, AZ 85012 (602)241-1502	
<b>RETURN SERVICE REQUESTED</b>	
	To the Parent/Guardian of:
Dear Parent or Guardian,	<b>JOHN DOE</b>
Our records indicate that your child may be due for one or more immunizations.	123 MAIN ST GLENDALE, AZ 85304
Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated. (If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.)	
We look forward to hearing from you soon.	

- **PREVIEW** – Displays a new window revealing the default postcard message with the radio button selected, along with an open field area to create your own custom message (shown below).



Figure 12-9: Postcard Message

**Reminder/Recall Postcard Options**

**Select Template**

☒ Default

☐ User Defined

**Postcard Message**

Dear Parent or Guardian,

Our records indicate that your child may be due for one or more immunizations.

Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated. (If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.)

We look forward to hearing from you soon.

**Print**

**Save & Print**

**Return to Reminder Recall Output**

4. If you are going to create a custom message, position the mouse pointer in the blank field area and type your text.
5. Click on one of the radio buttons:
  - **DEFAULT** – To display/print the default message and click the **PRINT** button to display/print.
  - **USER DEFINED** – To display/print the custom message and click on the **SAVE & PRINT** button to save your custom message and display/print the postcards.
6. Regardless of the button clicked, the postcards will display in a new window providing the option to print.



## INSTRUCTIONS FOR PRINTING ALL REMINDER RECALL OUTPUT

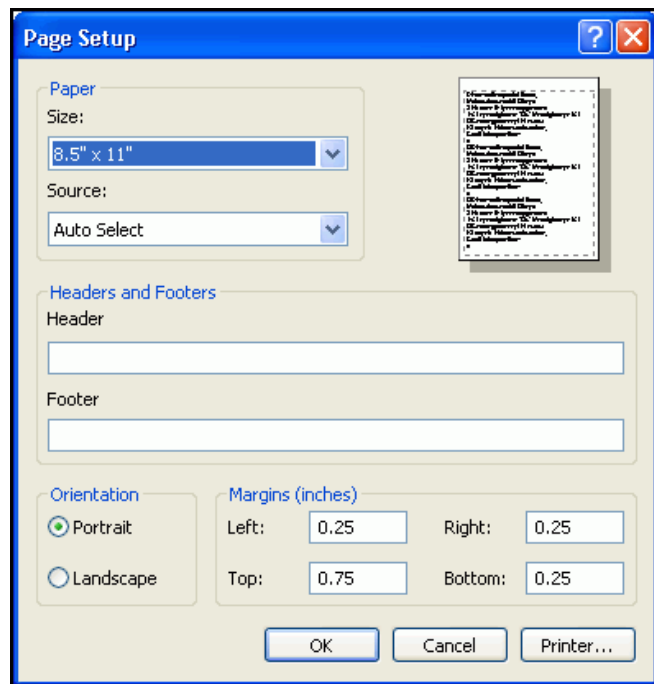
After displaying the output, more than likely you will want to print it. Verify your browser has been set up properly so headers and footers do not print on the output.

Additionally, depending on the output such as Postcards, you may need to change the margin setting(s).

### PAGE SETUP – HEADERS/FOOTERS & MARGINS

1. Point and click on the **FILE** menu and choose the **PAGE SETUP** option.
2. Delete all the text in the **HEADER** and **FOOTER** fields. Set the **TOP** margin to **0.75** with all the other ones set to **0.25**. Your Page Setup should look similar to this:

Figure 12-10: Page Setup – Headers and Footers





3. Click the **OK** button.
4. Click the **PRINT** icon to submit your output to the printer.

**Note:** You may want to periodically check this if your system is used for other types of printing.

## REMINDER RECALL OUTPUT SAMPLES

**Note:** If the application was configured to not display a barcode, a normal patient id number will be displayed.

**Patient Listing** – Displays/prints the report criteria, total patients selected, and all patients in order of last name.

**Figure 12-11: Patient Listing**

Reminder Recall Patient Recall Group Listing

Report Criteria

Report Date: February 25, 2004

IRMS: 1000

Recall Date: 01/01/1990 to 02/25/2004

Birth Date Range: All

Include Inactive Patients: No

Person Generating Recall:

Vacc. Families: DTaP/DT/Td\*, FLU, HEP-A, HEP-B 2 DOSE\*\*, HEP-B 3 DOSE\*\*, HIB, MMR, PNEUMO (PCV7), POLIO, VARICELLA

Facility: All

Health Plan: All

Physician: All


Program: All

District/Region Number: All

\* DTaP should be given to patients under 7 years old. Td should be given to patients 7 years old or older.

\*\* If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.

Total Patients Selected: 11

Bar Code/ID	First Name	Middle Name	Last Name	Birthday	Guardian F.N.	Phone Number
	JOIA	L	ARVIE	01/01/2001		
Vaccine Family Name		Dose Number		Recommended Date		Minimum Date
HEP-B 3 DOSE**		1		01/01/2001		01/01/2001
MMR		1		02/01/2002		02/01/2002
VARICELLA		1		02/01/2002		02/01/2002
DTaP/DT/Td*		1		03/01/2001		02/12/2001
HIB		1		03/01/2001		02/12/2001
POLIO		1		03/01/2001		02/12/2001
PNEUMO (PCV7)		1		03/01/2001		02/12/2001

**Mailing Labels** (Avery 5160) – Displays/prints three labels across and ten labels down, or a total of thirty labels per sheet.

**Figure 12-12: Mailing Labels**


To the parents of: THOMAS NIELSON  STC	To the parents of: JOAN1 SMITH 100 MAIN STREET PHOENIX, AZ 85012	To the parents of: JOAN2 SMITH 100 MAIN STREET PHOENIX, AZ 85012
---	---	---



## Reminder Recall

**Postcards** (Avery 8387) – Displays/prints two postcards across. Remember to type the "facility's return address" information. Requires special margin settings.

**Figure 12-13: Postcards**

<b>STC</b> 67 E. Weldon Avenue Phoenix, AZ 85012 (602)241-1502	
<b>RETURN SERVICE REQUESTED</b> 	
Dear Parent or Guardian,	To the Parent/Guardian of:
Our records indicate that your child may be due for one or more immunizations.	<b>JOHN DOE</b> 123 MAIN ST GLENDALE, AZ 85304
Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated. (If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.)	
We look forward to hearing from you soon.	

**Auto Dialer File** – Displays a text file that can be saved to your local hard drive or diskette. Refer to the sample output for additional instructions on saving.

**Figure 12-14: Auto Dialer File**

```
Right-click within the text area, choose Select All, and copy to a textfile.
8853,JOIA,ARVIE,,01/01/2001,,,,,Remind,
8854,JOIA,ARVIE,,01/01/2001,,,,,Remind,
15629,RAYMOND,BARONE,,07/07/1963,FRANK,,100 ELM STREET,STONY BROOK,NY,11790,Remind,
15670,BOB,CASEMAN,,05/15/2002,,,,,STC,,Remind,
15671,BOB,CLINTON,,04/14/2003,,,,,STC,,Remind,
15660,EMILY,JOHNSON,,04/04/2002,MARCIA,,,,,Remind,
15661,THOMAS,NIELSON,,06/06/2002,,,,,STC,,Remind,
15731,JOAN1,SMITH,,05/05/2002,,,100 MAIN STREET,PHOENIX,AZ,85012,Remind,
15732,JOAN2,SMITH,,05/05/2002,,,100 MAIN STREET,PHOENIX,AZ,85012,Remind,
15690,JOE,SMITH,,01/01/2003,,,,,Remind,
15691,JOE,SMITH,,01/01/2003,,,,,Remind,
```

**Emails**—Lists the patient, guardian, and email addresses of several patients on a list providing the option to send all the emails. Remember to type the "facility's return address" information.



Figure 12-15: Reminder Recall Email

**Reminder/Recall Email**

**Logged in:** SHERRI BULL **Date:** February 25, 2004

**Note:** Emails will only be sent to patients who have a valid email address listed.  
Please press the "Send Emails" button only once in order to avoid sending duplicate emails.

Patient	Guardian	Email Address
PEARY BARTLETT	TERRY	
SHERRY BARTLETT	TERRY	
SHERRI BULL		
SHERRI BULL		
SANDRA BULLOCK		
JOHN DOE	MARY	
TOMMY FRANKS	MARTHA	
GOLDEN GLOBE	MOMMY	
SALLY GREEN	LINDA	
ROBIN HOOD		
MURPHY JOLLEY	DANIELLE	
STEVE O		
SINGH SHANTI		
BOB SMITH		
TAMMY SMITH	MOMMY	
TOMMY TEST	MARIA	
TOMMY TEST	JUDY	
BERRETH TI	AMBER	

## 13 REPORTS MENU

The **REPORTS MENU** is grouped into four separate modules:

- Patient Record
- Report Module
- State Reports
- Management Reports



---

The report will always display in the window first for you to decide whether you want to print it or not.

## PATIENT RECORD

In order to obtain a Patient Record report, a patient search must be performed first.

All childhood vaccines will appear.

**Note:** For Washington, a message will appear at the bottom of the report, "If the above information contains errors or omissions, please contact your medical provider at the location indicated below: This report was generated on 11/22/00 by: clinic name, address, contact (name of user printing out the report). This report provided by the CHILD Profile Immunization Registry System."

1. From the **PATIENT** menu, point and click on the **SEARCH/ADD** option. The "Patient Search" window appears. Fill in the "search criteria" and click the **RUN SEARCH** button. The "Patient Search Results" window appears. Refer to the Patient Menu Search for detailed instructions.
2. From the **REPORTS** menu, point and click on the **PATIENT RECORD** option. The "Print Patient Record" limitation window appears.



**Print Patient Record**

**Patient Information To Include**

☒ Do Not Include Confidential Information  
☐ Include Confidential Information

---

**Vaccination Record Choices**

☒ Immunization Record (summary)  
☐ All Recorded Vaccinations  
☐ Forecast

☐ Printable Version (enable table borders)

**Create Report**

3. In the **PATIENT INFORMATION TO INCLUDE** section, point and click on the radio button to either:
  - **Do Not Include Confidential Information** – (Confidential Information such as: SSN, Race, Ethnicity, Medicaid Number, Birth File Number, Address, Phone, District, Country/Parish)
  - **Include Confidential Information**
4. In the **VACCINATION RECORD CHOICES** section, point and click on the radio button to display and print respective report. The reports are:
  - **All Recorded Vaccinations** – Reveals a breakdown per vaccine name.
  - **Immunization Record (Summary)** – Reveals a Summary of Vaccine Families
  - **Forecast** – Reveals the Forecast or dates that were/are scheduled for each Vaccine.
5. If you want to print "table borders" around the report, click the **PRINTABLE VERSION (ENABLE TABLE BORDERS)** checkbox.

Regardless of the report chosen, each report will contain the same type of information at the top; however, the report title will be reflected in the second line.




**Note:** If the barcode font and application are not configured, a patient ID will display instead of a barcode label.

6. Point and click the **CREATE REPORT** button. The report will display and be available for you to print. Report samples can be located on the next three pages.

## PATIENT RECORD—ALL RECORDED VACCINATIONS

This report reveals a breakdown per vaccine name and PPD, if entered. The illustration shown excludes confidential information.

**Note:** If the barcode font and application are not configured, a patient ID will display instead of a barcode label.


Patient Vaccination Record				
All Recorded Vaccinations				
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID				
Facility:				
Date: September 22, 2005				
Patient ID: 1	Phone:			
Name: JOHN DOE	Street:			
Birth Date: 01/01/2001	City:			
Gender: MALE	State:			
Guardian: MARY	ZIP:			
Physician: BRADY, MARCIA MD	Country:			
Medicaid No:	WIC ID:			
Vaccine Name	Dose 1	Dose 2	Dose 3	Dose 4
DTaP	03/01/2001	05/01/2001	07/01/2001	01/01/2002
IPV	05/05/2001			
Hib--unspecified	03/01/2001	05/01/2001	07/01/2001	
Hep B Ped/Adol - Preserv Free	01/01/2001			
Pneumococcal(PCV7)	03/01/2001	05/01/2001	07/01/2001	
MMR	01/01/2002			
Varicella	01/01/2002			
Polio - unspecified	03/01/2001	X 03/02/2001		
Next Vaccine Due: HEP-B 3 DOSE** Date: 02/01/2001				



## PATIENT RECORD – SUMMARY

This report reveals a summary of vaccine families. The illustration shown excludes confidential information.

**Note:** If the barcode font and application are not configured, a patient ID will display instead of a barcode label.


Patient Vaccination Record								
Summary (Does not include all vaccine types)								
Facility: CITY HOSPITAL								
Date: August 6, 2003					A 4 3 A			
Patient ID: 43		Phone:						
Name: MARY ANN SMITH		Street:						
Birth Date: 09/19/2002		City:						
Gender:		State:						
Guardian:		ZIP:						
Physician:								
Medicaid No:		WIC ID:						
Vaccine Name	Dose							
	1	2	3	4	5	6	7	8
DTaP/DTP/DT/Td	09/19/2002	08/06/2003						
Hib	09/19/2002							
Hep B - 3 Dose	09/19/2002							
Next Vaccine Due: HEP-B 3 DOSE** Date: 09/19/2002								



## PATIENT RECORD – FORECAST

This report reveals a summary of vaccine families.

**Note:** If the barcode font and application are not configured, a patient ID will display instead of a barcode label

Patient Vaccination Record			
Forecast			
Facility: CITY HOSPITAL Date: August 6, 2003		 A 4 3 A	
Patient ID: 43 Name: MARY ANN SMITH Birth Date: 09/19/2002 Gender: Guardian: Physician:		Phone: Street: City: State: ZIP:	
Medicaid No:		WIC ID:	
Vaccine Family	Dose	Scheduled Date	Minimum Valid Date
HEP-B 3 DOSE**	1	09/19/2002	09/19/2002
HIB	1	11/19/2002	10/31/2002
PNEUMO (PCV7)	1	11/19/2002	10/31/2002
POLIO	1	11/19/2002	10/31/2002
DTaP/DT/Td*	2	09/03/2003	09/03/2003
MMR	1	09/19/2003	09/19/2003
VARICELLA	1	09/19/2003	09/19/2003
HEP-B 2 DOSE**	1	09/19/2013	09/19/2013
* DTaP or DT should be given to patients under 7 years old. Td should be given to patients 7 years old or older. ** If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.			



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## 14 REPORT MODULE

Depending on your user access, this option allows you to print various types of reports in the following **categories**:

- **Vaccinations**
- **Patients**
- **Vaccines For Children (VFC)**
- **Site Information**
- **Registry**
- **Quality**
- **Administrative**

**Note:** Depending on your user access, you may not see all of the above categories.

Some of these reports can be run immediately and some can be scheduled to run later (due to their size and time to run). The reports that can be scheduled will have a **SCHEDULE** button to the right of the report title. Additionally, some of the scheduled reports can be faxed. Faxing is a "state configurable" option.

To use the **REPORTS MODULE**, perform the following steps:

1. From the **REPORTS** menu, point and click the **REPORT MODULE** option. The "Reports" window menu listing appears.



Reports			
Vaccinations		Patients	
Vaccination Totals		Daily Patient Immunization List	
Vaccinations Breakdown		Patient Detail	
Manufacturers		Patient Totals	
Lot Number Summary		Patient Breakdown	
Lot Recall Listing		Recall for Inactivation	
Vaccine Deferrals		Race and Ethnicity Correlation	
		Updated Patients Labels	
		High Risk Patients	
Vaccines for Children		Site Information	
VFC Vaccinations Breakdown		Programs	
Vaccine Administered		Health Plans	
VFC Accountability Log		Facilities Detail	
		Physician/Vaccinator Detail	
Registry		Quality	
Updated Patients/Vaccinations	Schedule	Data Quality by IRMS and Facility	Schedule
Provider Submission Detail	Schedule	Patient Data Quality Detail	Schedule
Provider Submission	Schedule	Vaccination Data Quality	Schedule
Provider Response	Schedule	Vaccination Data Quality Detail	Schedule
Weekly Status	Schedule		
Registry Statistics	Schedule		
Daily Status	Schedule		
Patients Vaccinated			
Administrative			
Patient Queries		Usage Tracking	
Patient Changes		Bad Logins	Schedule
Antigen Summary			

- Point and click on the title of the **REPORT** you want to run. Depending on the report chosen, a window of "limitations and selections" may appear for you to set up the specifics for the report; otherwise, the report will immediately display.
- Refer to the **Category** of the report and then the **Report Title** for complete instructions. If the report is to be scheduled, refer to the major section titled, "Using the Scheduler" for instructions.



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## USING THE SCHEDULER TO OBTAIN REPORTS

Regardless of the report, the method of using the scheduler is the same. Perform the following steps to set up a schedule for any report title that contains a **SCHEDULE** button.

**Note:** Using a scheduler such as the Microsoft Scheduler can also setup automatic running/processing of files or reports.

1. Depending on your user access, the "Select IRMS" window may appear.

Select IRMS  
Choose an IRMS for this session.  
IRMS #: --select--  
Continue

2. Click on the drop-down arrow to view/select an **IRMS #** and then click the **CONTINUE** button.
3. Click on the **REPORTS** menu option. The "Reports" listing appears.



Reports			
Vaccinations		Patients	
Vaccination Totals		Daily Patient Immunization List	
Vaccinations Breakdown		Patient Detail	
Manufacturers		Patient Totals	
Lot Number Summary		Patient Breakdown	
Lot Recall Listing		Recall for Inactivation	
Vaccines for Children		Site Information	
VFC Vaccinations Breakdown		Programs	
Vaccine Administered		<a href="#">Health Plans</a>	
VFC Accountability Log		Facilities Detail	
		Physician/Vaccinator Detail	
Registry		Quality	
Daily Status	<a href="#">Schedule</a>	Data Quality by IRMS	<a href="#">Schedule</a>
Provider Submission	<a href="#">Schedule</a>	Data Quality by Facility	<a href="#">Schedule</a>
Provider Response	<a href="#">Schedule</a>	Patient Data Quality Detail	<a href="#">Schedule</a>
Weekly Status	<a href="#">Schedule</a>	Vaccination Data Quality	<a href="#">Schedule</a>
Updated Patients/Vaccinations	<a href="#">Schedule</a>	Vaccination Data Quality Detail	<a href="#">Schedule</a>
Registry Statistics	<a href="#">Schedule</a>		
Registry Status Report			
Administrative			
Patient Queries		Usage Tracking	
Patient Changes		Bad Logins	<a href="#">Schedule</a>
Antigen Summary			

4. Continue to the next section.

## ADDING A SCHEDULED TASK TO THE SCHEDULER

To add a Task to the Schedule, perform the following:

1. Click on the report's **SCHEDULE** button. The "Add a Scheduled Task" window appears.



User Scheduled Tasks			
Name:	Schedule:	Next Run Time:	
Add Scheduled Tasks			
Task Name:	Daily Status Report		
Minute:	:00		
Hour	12 A.M.		
Day of Month:			
Month			
Day of Week			
Task:	Daily Status Report		
			<div>Cancel</div> <div>Next</div>

2. Refer to the table for a list of fields and descriptions:

OPTION	DESCRIPTION
<b>Select Schedule Parameters</b>	
<b>TASK NAME</b>	Automatically fills in from the report's schedule button pressed on the reports menu.
<b>MINUTE</b>	The minutes that can be chosen are in five-minute intervals and will be used with the Hours field to indicate the "kick off" time for the report to run. Click on the drop-down arrow and point and click to make a selection. 00 is the default.
<b>HOUR</b>	The hours are an hour apart and will be used with the Minutes field to indicate the "kick off" time for the report to run. Click on the drop-down arrow and point and click to make a selection. 12 AM is the default.
<b>DAY OF MONTH</b>	Specific day of the month the report should run. If a blank appears, the report will run EVERY DAY. Click on the drop-down arrow and point and click to make a selection. Blank (or every day) is the default.
<b>MONTH</b>	Specific month the report should run. If a blank appears, the report will run EVERY MONTH. Click on the drop-down arrow and point and click to make a selection. BLANK (or every month) is the default.



OPTION	DESCRIPTION
<b>DAY OF WEEK</b>	Specific day of week the report should run. If a blank appears, the report will run EVERY DAY. Click on the drop-down arrow and point and click to make a selection. BLANK (or every day) is the default).
<b>EMAIL ADDRESS(ES)</b>	Permits you to type the email addresses of the person(s) who are to receive the report. If more than one person is going to get the report, separate each email address with a comma.

3. Click one of the available buttons:
- **CANCEL** – Does not save entries/selections and exits to the Reports menu.
  - **NEXT** – Advances to the second window to select additional information (IRMS, Facility, email addresses, etc.) for the report.



Add Scheduled Tasks	
Task Name:	Daily Status Report
Select IRMS's that the report should go to: (To select multiple IRMS's use control and left click on mouse)	<div>Select an IRMS</div> <div>PCIC_SOURCE CLIENT_SERVER_INTERNAL_IRMS_ID</div>
Select facilities that the report should go to: (To select multiple IRMS's use control and left click on mouse)	<div>Select a Facility</div> <div>STC TEST1 TEST HOSPITAL CMG1</div>
Other email addresses the report should be sent to: (Use a comma to separate multiple addresses)	<div></div>
Select IRMS's that the report should be faxed to: (To select multiple IRMS's use control and left click on mouse)	<div>Select an IRMS</div> <div>PCIC_SOURCE CLIENT_SERVER_INTERNAL_IRMS_ID</div>
Select facilities that the report should be faxed to: (To select multiple IRMS's use control and left click on mouse)	<div>Select a Facility</div> <div>STC TEST1 TEST HOSPITAL CMG1</div>
Other fax numbers the report should be sent to: (Use a comma to separate multiple phone numbers)	<div></div>
<div>Cancel Add</div>	

4. Point and click on the names of the **IRMS(s)** the report should be **EMAILED** to. Multiple selections can be chosen if you hold down the **CTRL** key while selecting from the list.
5. Point and click on the names of the **FACILITIES** the report should be **EMAILED** to. Multiple selections can be chosen if you hold down the **CTRL** key while selecting from the list.



6. Type the **EMAIL ADDRESSES** where the report should be **EMAILED**. Separate the email addresses with a comma.
7. Point and click on the names of the **IRMS(s)** the report should be **FAXED** to. Multiple selections can be chosen if you hold down the **CTRL** key while selecting from the list.

**Note:** Faxing is a "state configurable" option and only certain reports can be faxed.

8. Point and click on the names of the **FACILITIES** the report should be **FAXED** to. Multiple selections can be chosen if you hold down the **CTRL** key while selecting from the list.
9. Type the **FAX NUMBER(S)** where the report should be sent. Separate the FAX NUMBERS with a comma. Type the area code if different than yours and do not use dashes/hyphens between the numbers.
10. Click on the **ADD** button. The "User Scheduled Tasks List" appears with all scheduled tasks. For example:

User Scheduled Tasks			
Name:	Schedule:	Next Run Time:	
<a href="#">Daily Status Report</a>	Every Wednesday at 12:00 AM	Wednesday, March 24, 2004 at 12:00 AM	<a href="#">Delete</a>

11. You can **ADD** another **TASK** (repeat the above instructions), **EDIT** the existing tasks, or **DELETE** a task. Continue to the appropriate section below.

## EDITING A SCHEDULE

To edit an existing Task, perform the following steps within the Reports Module, or you can edit a schedule from the UFM module:

1. Point and click on the **SCHEDULE** button to the right of the report's title. The "User Scheduled Tasks" window appears.
2. Point and click on the **REPORT NAME** (which is a hyperlink) whose schedule you want to edit. The "Edit Scheduled Tasks" window appears.



Edit Scheduled Task	
Task Name:	Daily Status Report
Minute:	:00
Hour:	12 A.M.
Day of Month:	
Month:	
Day of Week:	Wednesday
Task:	Daily Status Report
<div>Cancel Next</div>	

3. Edit the desired field(s) and click the **NEXT** button if you need to edit email addresses and/or fax numbers (if applicable).
4. Verify the report names of the **IRMS**(s) been selected. Multiple selections can be made by holding down the **CTRL** key, while selecting from the list.
5. Verify the names of the **FACILITIES** the report should be emailed to have been selected. Multiple selections can be made by holding down the **CTRL** key, while selecting from the list.
6. Verify the **EMAIL ADDRESSES** are correct of where the report should be sent and change if necessary. Separate the email addresses with a comma.
7. If the report is one that can be faxed, make the necessary changes in the **FAX** fields.
8. Click on the **ADD** button. The "User Scheduled Tasks List" reappears with all scheduled tasks.

## DELETING A SCHEDULE

To delete an existing task schedule, perform the following steps within the Reports Module, or you can edit a schedule from the UFM module:

1. Point and click on the **SCHEDULE** button to the right of the report's title. The "User Scheduled Tasks" window appears.
2. Point and click on the **DELETE** hyperlink to the right of the **REPORT NAME** you want to delete. The TASK will immediately get deleted and be removed from the list.



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## VACCINATION REPORTS

The Vaccination Reports Category includes the following reports:

- Vaccination Totals
- Vaccinations Breakdown
- Manufacturers
- Lot Number Summary
- Lot Recall Listing

Each report's window of limitations and selections is shown under the individual report's title.

### VACCINATION TOTALS

This report displays counts of vaccinations administered (or added as historical) by any of the following categories: Facility, Facility Group, Vaccinator, Program, Health Plan, Zip Code, State, County/Parish, or District/Region.

1. From the **VACCINATIONS CATEGORY**, point and click on the **VACCINATION TOTALS REPORT**. The report's limitation/selection window appears.



Vaccination Totals Report		
<input type="checkbox"/> Include Historical Vaccinations		
<b>Limit Report By</b>		
<input type="checkbox"/> Vaccination Dates	From: <input type="text"/>	To: <input type="text"/>
<b>Display By</b>		
<input checked="" type="radio"/> All <input type="radio"/> Half Hour <input type="radio"/> Hour <input type="radio"/> Day		
<b>Vaccination VFC Status</b>		
<input checked="" type="radio"/> All (Eligible and Ineligible) <input type="radio"/> Eligible Only <input type="radio"/> Ineligible Only		
<b>Report Type</b>		
<input type="radio"/> Total Vaccinations by IRMS		
<input type="radio"/> Total Vaccinations by Facility Group		
<input type="radio"/> Total Vaccinations by Facility		
<input checked="" type="radio"/> Total Vaccinations by Vaccinator		
<input type="radio"/> Total Vaccinations by Program		
<input type="radio"/> Total Vaccinations by Health Plan		
<input type="radio"/> Total Vaccinations by ZIP Code		
<input type="radio"/> Total Vaccinations by State		
<input type="radio"/> Total Vaccinations by County/Parish		
<input type="radio"/> Total Vaccinations by District/Region		
<input type="radio"/> Total Vaccinations by Vaccine		
<div>Back   Reset   Create Report</div>		

2. Click in the "**Include Historical Vaccinations**" if you want to include them.
3. Type the **FROM** and **TO** dates if you want to limit the report by vaccination dates.
4. Click the radio button to select the **Vaccination VFC Status**. Statuses are:
  - **All** – Includes both Eligible and Ineligible
  - **Eligible Only**
  - **Ineligible Only**
5. Point and click the radio button to select the **REPORT TYPE** which will **group** the **Total Vaccinations** by:
  - Facility
  - Facility Group
  - Vaccinator
  - Program
  - Health Plan



- Zip Code
- State
- County/Parish
- District/Region

6. Point and click one of the available buttons:

- **RESET** – to erase newly entered/selected items and re-enter new criteria.
- **BACK** – to not submit the report and return to the previous “Reports Menu” list.
- **CREATE REPORT** – to display the report output in a new window (sample shown below).

Vaccination Totals		
Report Criteria		Report Date: March 23, 2004
IRMS:	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID	
Report Type:	By Vaccinator	
VFC Status:	All	
Include Historical Vaccinations:	No	
Vaccination Date Range:	All	
Total Vaccinations Selected: 102		
Vaccinator	Number of Vaccinations	Percent of Total Selected
NO VACCINATOR SPECIFIED	99	97.06
PVLNAME, PVFNAME	3	2.94

## VACCINATIONS BREAKDOWN

This report displays all vaccinations by vaccine type for inactive/active patients, by date range, birth date range, per facility, state, county/parish, zip code, vaccinator, program, health plan, race, VFC Code, and District/Region. A grand total for the "Total" column appears at the bottom of the report.

1. From the **VACCINATIONS CATEGORY**, point and click on the **VACCINATIONS BREAKDOWN REPORT**. The report's limitation/selection window appears.



Vaccinations Breakdown Report		
<input type="checkbox"/> Include Inactive Patients	<input type="checkbox"/> Include Historical Vaccinations	
<b>Limit Report By</b>		
<input type="checkbox"/> Vaccination Date Range	From: <input type="text"/>	To: <input type="text"/>
<input type="checkbox"/> Patient Birth Date Range	From: <input type="text"/>	To: <input type="text"/>
<input type="radio"/> Facility	--select-- <input type="button" value="v"/>	
<input checked="" type="radio"/> Do Not Limit		
<input type="checkbox"/> State	--select-- <input type="button" value="v"/>	
<input type="checkbox"/> County/Parish	--select-- <input type="button" value="v"/>	
<input type="checkbox"/> ZIP Code	<input type="text"/>	
<input type="checkbox"/> Vaccinator	--select-- <input type="button" value="v"/>	
<input type="checkbox"/> Program	--select-- <input type="button" value="v"/>	
<input type="checkbox"/> Health Plan	--select-- <input type="button" value="v"/>	
<input type="checkbox"/> Race	--select-- <input type="button" value="v"/> White <input type="button" value="v"/>	
<input type="checkbox"/> VFC Code	--select-- <input type="button" value="v"/>	
<input type="checkbox"/> District/Region	<input type="text"/>	
<div>Back Reset Create Report</div>		

2. Point and click in the "**Include Inactive Patients**" or the "**Include Historical Vaccinations**" checkbox if you want to include them.
3. Type the **FROM** and **TO** dates if you want to limit the report by "**Vaccination Date Range**" or "**Patient Birth Date Range**." The checkboxes will automatically get selected after entering the dates.
4. Point and click the drop-down arrow to select to limit by the **Facility**. The radio button will automatically be selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.
5. If desired, point and click on the drop-down arrow to select a **STATE**.

**Note:** State must be selected before selecting a county/parish.

6. If desired, point and click on the drop-down arrow to select a **COUNTY/PARISH**.
7. If desired, type the **ZIP CODE**.
8. If desired, point and click on the following drop-down arrows to limit the report by:
  - Vaccinator



- Program
  - Health Plan
  - Race
  - VFC Code
9. Type the **District/Region**. This is a whole number. As soon as data is entered, the checkbox will automatically get selected.
  10. Point and click one of the available buttons:
    - **RESET** – to erase newly entered/selected items and re-enter new criteria.
    - **BACK** – to not submit the report and return to the “Reports Menu” list.
    - **CREATE REPORT** – to display the report output in a new window (sample shown below).

Vaccinations Breakdown		
Report Criteria		Report Date: March 23, 2004
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID Facility: All Include Inactive Patients: No Include Historical Vaccinations: No Vaccinator: All Health Plan: All Race: All Vaccination Date Range: All		
Birth Date Range: All VFC Code: All Program: All ZIP Code: All State: All County: All District/Region: All		
Selected Total: 102		
Vaccine Name	Number of Vaccinations	Percent of Total Selected
DTaP	99	97.06
Smallpox	1	0.98
Smallpox Major Take	2	1.96

## MANUFACTURERS

This report immediately displays a list of all active vaccine manufacturers and codes.

1. From the **VACCINATIONS CATEGORY**, point and click on the **MANUFACTURERS REPORT**. The report immediately appears in a separate browser window.



## Reminder Recall

Vaccine Manufacturers		
Manufacturer Code	Manufacturer	Report Date: March 23, 2004
AB	ABBOT	
AD	ADAMS	
ALP	ALPHA	
AVB	AVENTIS BEHRING L.L.C.	
PMC	AVENTIS PASTEUR INC.	
AVI	AVIRON	
BAH	BAXTER HEALTHCARE CORPORATION	
BAY	BAYER CORPORATION	
BPC	BERNA PRODUCTS CORPORATION	
MIP	BIOPORT CORPORATION	
CHI	CHIRON CORPORATION	
SKB	GLAXOSMITHKLINE	
GRE	GREER	
IUS	IMMUNO-US	
KGC	KOREA GREEN CROSS	
MBL	MASSACHUSETTS BIOLOGICAL LABS	
MED	MEDIMMUNE, INC.	
MSD	MERCK	
JPN	MICROBIAL DIS/OSAKA U	
NAB	NABI	
NYB	NEW YORK BLOOD CENTER	

## LOT NUMBER SUMMARY

This report displays a summary of Vaccine Name, Lot Number, Manufacturer, Expiration Date, VFC Eligibility, Number of Doses Available, Doses Used, Doses Wasted, and Total Doses.

- From the **VACCINATIONS CATEGORY**, point and click on the **LOT NUMBER SUMMARY REPORT**. The report's limitation/selection window appears.

Lot Number Summary	
<input type="checkbox"/> Include Inactive Lot Numbers	<input type="checkbox"/> Include Expired Lots
<b>Limit By</b>	
<input type="checkbox"/> Report Date	From: <input type="text"/> To: <input type="text"/>
<input type="checkbox"/> Expiration Date	From: <input type="text"/> To: <input type="text"/>
<input checked="" type="checkbox"/> IRMS	1000-CLIENT_SERVER_INTERNAL_IRMS_ID <input type="button" value="v"/>
<input type="radio"/> Facility	--select-- <input type="button" value="v"/>
<input type="radio"/> Facility Group	--select-- <input type="button" value="v"/>
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> Manufacturer	--select-- <input type="button" value="v"/>
<input type="checkbox"/> Vaccine Name	--select-- <input type="button" value="v"/>
<input type="checkbox"/> Publicly Supplied Only	
<b>Order By</b>	
<input checked="" type="radio"/> Vaccine Name	
<input type="radio"/> Manufacturer	
<input type="radio"/> Expiration Date	
<input type="radio"/> Lot Number	
<input type="button" value="Back"/> <input type="button" value="Reset"/> <input type="button" value="Create Report"/>	

- The fields and their descriptions are listed in the table:



FIELD	DESCRIPTION
<b>INCLUDE INACTIVE LOT NUMBERS</b>	Point and click in the "Include Inactive Lot Numbers" if you want to include them.
<b>INCLUDE EXPIRED LOTS</b>	Point and click in the "Include Expired Lots" if you want to include them.
<b>REPORT DATE</b>	To limit the report by a specific date range, type both the From and To dates into their respective fields.  <b>Note:</b> If the report is run by Report Date, the report will display a "Starting number of Doses" column. The Starting number of Doses will be the # of doses available at the beginning of the date range.
<b>EXPIRATION DATE</b>	To limit the report by a specific expiration date range, type both the From and To dates into their respective fields.
<b>IRMS</b>	To limit the report by a specific IRMS, click the drop-down menu arrow to view/select a valid choice.
<b>FACILITY, FACILITY GROUP, DO NOT LIMIT</b>	To limit the report by a specific Facility or Facility Group, click the drop-down menu arrow to view/select a valid choice from the respective fields.
<b>MANUFACTURER</b>	To limit the report by a specific manufacturer, click the drop-down menu arrow to view/select a valid choice.
<b>VACCINE NAME</b>	To limit the report by a specific vaccine, click the drop-down menu arrow to view/select a valid choice.
<b>PUBLICLY SUPPLIED ONLY</b>	To limit the report by Publicly Supplied Vaccines, click the checkbox to select/deselect it

3. Point and click in the **ORDER BY** category so that the data will appear in the desired order. Categories are:
- Vaccine Name
  - Manufacturer
  - Expiration Date



- Lot Number
4. Point and click one of the available buttons:
    - **BACK** – to return to the Reports menu list.
    - **RESET** – to erase any newly entered/selected items and remain on the window to reenter new criteria.
    - **CREATE REPORT** – to send the query and display the report output in a new window.

Lot Number Summary										
Report Criteria:							Report Date: August 31, 2005			
IRMS:		1000 - CLIENT_SERVER_INTERNAL_IRMS_ID								
Facility:		All								
Vaccine Name:		All					Include Inactive Lots:		No	
Manufacturer:		All					Include Expired Lots:		No	
Expiration Date Range:		All					Publicly Supplied Only:		No	
Report Date Range:		01/01/2005 to 08/01/2005					Sort Order:		Vaccine Name	
<b>Note:</b> This report was run for a limited date range. All inventory counts displayed (Doses Available, Doses Total, etc.) reflect the inventory during that period of time only.										
Lot Number	Vaccine Name	Manufacturer	Expires	Publicly Supplied	Doses Available	Starting Doses	Doses Adjusted	Doses Used	Doses Wasted	Inactive
9514532	DTaP	ABBOT	01/01/2008	Y	95	96	0	1	0	

## LOT RECALL LISTING

This report will list out all of the patients who received a shot from a specific lot.

1. From the **VACCINATIONS CATEGORY**, point and click on the **LOT RECALL LISTING REPORT**. The report's limitation/selection window appears.

Lot Recall Report Listing	
<b>Limit Report By</b>	
<input checked="" type="radio"/> Active Lots	--select--
<input type="radio"/> Inactive Lots	--select--
<input type="radio"/> All Expired Lots	--select--
<div>Back</div> <div>Reset</div> <div>Create Report</div>	

2. Point and click one of the radio buttons to limit the report by:
  - Active Lots
  - Inactive Lots
  - Expired Lots
3. Point and click one of the available buttons:



- **RESET** – to erase newly entered/selected items and re-enter new criteria.
- **BACK** – to not submit the report and return to the “Reports Menu” list.
- **CREATE REPORT** – to display the report output in a new window (sample shown below).

Lot Recall Report					
Report Criteria				Report Date: March 23, 2004	
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID	Manufacturer: GREER	Lot Number: SMALL-1	Publicly Supplied: N	Lot Facility: TEST HOSPITAL CMG1	
Vaccine: Smallpox					
Vaccination Date	Vaccinating Facility	SIIS Patient ID	First Name	Last Name	Birthday
01/01/2004	TEST HOSPITAL CMG1	54	ROGER	TESTFR1	01/01/1980
Total Patients Selected: 1		Total Vaccinations Administered: 1			

## VACCINE DEFERRAL

This report will list the patient ID, patient name, date of birth, vaccine, and dose that was deferred in tabular format. It can be limited by IRMS, Facility, or Facility Group depending on the user's access level and can be summarized or detailed.

**Note:** This report will print what was entered on the Deferral window versus what is on the Vaccination Schedule.

1. From the **VACCINATIONS** category, click the report's title. The report's "Limitations/Selections" window appears.

Vaccine Deferral Report	
Report	<input checked="" type="radio"/> Summary <input type="radio"/> Detail
<input type="checkbox"/> Vaccine	--select--
<input type="radio"/> Facility	--select--
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> District / Region	
<input type="button" value="Back"/> <input type="button" value="Reset"/> <input type="button" value="Create Report"/>	

2. In the **REPORT** section, click on the radio button to select **SUMMARY** or **DETAIL**.



3. In the **VACCINE** field, click the drop-down menu arrow and select the vaccine. The Vaccine checkbox will automatically get selected/checked.
4. In the **IRMS** field, click the drop-down menu arrow and select the IRMS you want the report to limit by.
5. In the **FACILITY/GROUP/DO NOT LIMIT** report section, click on the drop-down menu arrow and select the Facility or Facility group; otherwise leave the Do Not Limit radio button selected.
6. In the **DISTRICT/REGION** field, type the name/number. The checkbox will automatically get selected.
7. Click one of the available buttons:
  - **RESET** – to clear the input fields and remain on the window to re-enter criteria.
  - **BACK** – to not submit the report and return to the “Reports Menu” list.
  - **CREATE REPORT** – to display the report in a new browser window providing the option to print. Shown below are illustrations of the Summary and Detail reports, respectively without limitations.

Vaccine Deferrals Summary Report				
Count of Deferred Vaccinations Given				
Report Criteria:			Report Date: July 22, 2004	
	IRMS 1000	Unknown IRMS	IRMS 1001	Total
MMR	1			1
Hib--unspecified	1			1
DTaP	1	1	1	3
Varicella	1			1
HBIG	1			1
PPD Test	1			1
Botulinum Antitoxin	1			1
Diphtheria antitoxin	1			1
Hep A/Hep B - Adult	1			1
Hep A 2 dose - Adult	1			1
<b>Total</b>	<b>10</b>	<b>1</b>	<b>1</b>	<b>12</b>



Vaccine Deferrals Report						
Listing of Patients Given Deferred Vaccinations						
Report Criteria:				Report Date: July 22, 2004		
12 matches found						
SIIS Id	First Name	Last Name	Vaccine	Dose	Date	IRMS
68684	CPYLA	019809209	DTaP	5	07/16/2004	1001
122713	AL	CAPONE	DTaP	423	07/13/2004	
122724	JANE	DOE	DTaP	2	07/16/2004	1000
122710	JOHN	DOE	Botulinum Antitoxin	2	07/16/2004	1000
122710	JOHN	DOE	Diphtheria antitoxin	1	07/16/2004	1000
122710	JOHN	DOE	HBIG	1	07/16/2004	1000
122710	JOHN	DOE	Hep A 2 dose - Adult	1	07/16/2004	1000
122710	JOHN	DOE	Hep A/Hep B - Adult	1	07/16/2004	1000
122710	JOHN	DOE	Hib--unspecified	1	07/16/2004	1000
122710	JOHN	DOE	MMR	1	07/16/2004	1000
122710	JOHN	DOE	PPD Test	1	07/16/2004	1000
122710	JOHN	DOE	Varicella	1	07/16/2004	1000

## PATIENTS REPORTS

Each report's window of limitations and selections is shown under the individual report's title.

### DAILY PATIENT IMMUNIZATION LIST

This report lists all of the immunizations given on a specific date and can be listed by facility and/or vaccinator. In addition, this report can run by school in order to provide information back to schools on those that received immunizations.

- From the **PATIENTS CATEGORY**, point and click on the **DAILY PATIENT IMMUNIZATION LIST**. The report's limitation/selection window appears.

Daily Patient Immunization List	
<b>Limit Report By</b>	
<b>Shots Given on this Date:</b>	<input type="text"/>
<input type="radio"/> Facility	--select--
<input checked="" type="radio"/> Do Not Limit	
<input type="radio"/> School	<input type="text"/> <a href="#">Click to select</a>
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> Vaccinator	--select--
<input type="checkbox"/> Hide Dose Number	(Hint: Utilize this checkbox if report performance is slow.)
<input type="button" value="Reset"/> <input type="button" value="Create Report"/>	



2. You must enter a date in the "**Shots Given on this Date**" field. Dates are entered in the mmddyyyy format.
3. You can optionally select to limit the report by any of the following:
  - **Facility or NOT LIMIT BY FACILITY.** To limit by Facility, click the drop-down arrow and choose a facility. The radio button will automatically be selected.
  - **School or NOT LIMIT BY SCHOOL.** To limit by School, click on the "click to select" hyperlink. The "Select School" window appears.

- Select the appropriate **STATE** by clicking on the drop-down
- Select the **COUNTY** – The **ALL** radio button is chosen by default; however, click the drop-down arrow to select the specific county. The **SELECT** radio button will then automatically get selected.
- Select **TYPE** (of school)–**ALL** (for both public and private); or **PUBLIC ONLY**; or **PRIVATE ONLY** (for a list of private schools).
- Select **NAME** – You can select **BEGINS WITH** or **CONTAINS** and type the name (or partial name) of the school.
- Press the **SEARCH** button. The "Search Results" appear.
- Click on the **SELECT ARROW** to choose a school—the school will automatically copy into the



School field; or click **CLEAR** to erase and type a different name; or click on **CANCEL** to exit and not make a selection.

- The "Daily Patient Immunization List" window reappears with your school selection.
4. If desired, point and click the drop-down arrow to select a **VACCINATOR**.
  5. Point and click one of the available buttons:
    - **RESET** – to erase newly entered/selected items and re-enter new criteria.
    - **BACK** – to not submit the report and return to the “Reports Menu” list.
    - **CREATE REPORT** – to display the report output in a new window (sample shown below).

Daily Patient Immunization List						
Report Criteria				Report Date: August 6, 2003		
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID						
Facility: All						
Shots Given on this Date: 08/06/2003						
Vaccinator: All						
Patient Name	Birth Date	Vaccine	Dose	Facility	Vaccinator	
SMITH, MARY ANN	09/19/2002	DTaP	2	AP&S- REED,SCULLY,GARB#00000164	ROBSON, BOB	
Total Number of Vaccines: 1						
Total Number of Patients: 1						

## PATIENT DETAIL REPORT (BY OWNERSHIP)

This report displays detailed information about patients that are owned by the user's IRMS/Facility and the vaccinations their patients received.

1. From the **PATIENTS CATEGORY**, point and click on the **PATIENT DETAIL REPORT**. The report's limitation/selection window appears.



Patient Detail Report by Ownership		
<b>Limit Report By</b>		
<input type="checkbox"/> Vaccination Date Range	From: <input type="text"/>	To: <input type="text"/>
<input type="checkbox"/> Birth Date Range	From: <input type="text"/>	To: <input type="text"/>
<input type="radio"/> Facility	--select--	
<input checked="" type="radio"/> Do Not Limit		
<input type="checkbox"/> State	--select--	
<input type="checkbox"/> County/Parish	--select--	
<input type="checkbox"/> ZIP Code	<input type="text"/>	
<input type="checkbox"/> Primary Care Physician	Select from the list below:	
	--select--	
<input type="checkbox"/> Program	--select--	
<input type="checkbox"/> Health Plan	--select--	
<input type="checkbox"/> Race	--select-- White	
<input type="checkbox"/> VFC Code	--select--	
<input checked="" type="checkbox"/> Inactive Status	Active patients only	
<input type="checkbox"/> Lot Number	Select from the list below:	
	--select--	
<input type="checkbox"/> District/Region	<input type="text"/>	
<input type="radio"/> School	<input type="text"/>	
<input checked="" type="radio"/> Do Not Limit		
<input type="checkbox"/> Only Show Patient Info		
<input type="checkbox"/> High Risk Category	--select--	
<a href="#">Click to select</a>		
<a href="#">Back</a> <a href="#">Reset</a> <a href="#">Create Report</a>		

2. Type the **FROM** and **TO** dates if you want to limit the report by **VACCINATION DATE** or **BIRTH DATE** range. The checkbox will automatically select.
3. Point and click the drop-down arrow to select to limit by the **Facility**. The radio button will automatically be selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.
4. If desired, point and click on the drop-down arrow to select a **STATE**.  
  
**Note:** State must be selected before County/Parish can be selected.
5. If desired, point and click on the drop-down arrow to select a **COUNTY/PARISH**.
6. If desired, type the **ZIP CODE**.
7. If desired, point and click on the following drop-down arrows to limit the report by:



- Primary Care Physician
  - Program
  - Health Plan
  - Race
  - VFC Code
  - Inactive Status
  - Lot Number
8. Type the District/Region. This is a whole number. As soon as data is entered, the checkbox will automatically get selected.
9. You can optionally select to limit the report by **School** or **NOT LIMIT BY SCHOOL**. To limit by School, click on the "click to select" hyperlink. The "Select School" window appears.

- Select the appropriate **STATE** by clicking on the drop-down
- Select the **COUNTY** – The **ALL** radio button is chosen by default; however, click the drop-down arrow to select the specific county. The **SELECT** radio button will then automatically get selected.
- Select **TYPE** (of school)–**ALL** (for both public and private); or **PUBLIC ONLY**; or **PRIVATE ONLY** (for a list of private schools).



- 
- Select **NAME** – You can select **BEGINS WITH** or **CONTAINS** and type the name (or partial name) of the school.
  - Press the **SEARCH** button. The "Search Results" appear.
  - Click on the **SELECT ARROW** to choose a school—the school will automatically copy into the School field; or click **CLEAR** to erase and type a different name; or click on **CANCEL** to exit and not make a selection.
  - The "Patient Detail" window reappears with your school selection.
10. To limit the report to **ONLY SHOW PATIENT INFO**, only the following fields will appear on the report.
- First Name
  - Middle Name
  - Last Name
  - Birthday
  - Guardian FN
  - Phone Number
  - School
  - Vaccination headers will appear without data
11. To limit the report by **HIGH RISK CATEGORY**, click the drop-down menu arrow to view/select a category.
- Note:** The High Risk Categories must be defined by the SIIS Administrator before it will show up as an option on this window.
12. Point and click one of the available buttons:
- **RESET** – to erase newly entered/selected items and re-enter new criteria.
  - **BACK** – to not submit the report and return to the "Reports Menu" list.
  - **CREATE REPORT** – to display the report output in a new window (sample shown below).
-



Patient Detail Report by Ownership						
Report Criteria				Report Date: March 23, 2004		
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID						
Facility: All				Vaccination Date Range: All		
Patients Status: Active and inactive patients				VFC Code: All		
Birth Date Range: All				Program: All		
Physician: All				ZIP Code: All		
Health Plan: All				State: All		
Race: All				County/Parish: All		
Lot Number: All				School: All		
District/Region: All						
Total Patients Selected: 35 Deleted vaccinations are shown with a line through them.						
First Name	Middle Name	Last Name	Birthday	Guardian F.N.	Phone Number	School
MISTY		ALDAMA	01/21/2001	MARY	(654)357-1584	
Vaccine Name		Vaccination Date		Manufacturer Code		Historical
DTaP		03/21/2001				N
DTaP		05/21/2001				N
DTaP		07/21/2001				N
DTaP		01/21/2002				Y

## PATIENT TOTALS (BY SERVICE)

This report will display totals of the number of patients seen regardless of current ownership. It also includes a Total Visits column (using vaccination dates from the database) to record the number patients that received services more than once over a period of time. In addition, there are various options to limit the report including Program, Race, and City as well as Birth Date, Appointment, and Immunization date ranges. A grand total for the "Total" column appears at the bottom of the report.

### **Note:**

The **Total Visits** column will not appear when the report is run by day, hour, or half hour since vaccinations are recorded by date versus time. It is also important to mention that "Total Visits" will be incremented for each race when a multi-racial patient is included in the report. For example, if a patient was included as having two races, then even though that patient was only seen once, the total for each of their races would be incremented.

1. From the **PATIENTS CATEGORY**, point and click on the **PATIENT TOTALS REPORT**. The report's limitation/selection window appears.



## Reminder Recall

Patient Totals by Service		
<b>Limit Report By</b>		
<input type="checkbox"/> Immunization Dates	From: <input type="text"/>	To: <input type="text"/>
<input type="checkbox"/> Birth Dates	From: <input type="text"/>	To: <input type="text"/>
<input type="checkbox"/> Next Appointment Dates	From: <input type="text"/>	To: <input type="text"/>
<b>Display By</b>		
<input checked="" type="radio"/> All <input type="radio"/> Half Hour <input type="radio"/> Hour <input type="radio"/> Day		
<input type="checkbox"/> District / Region	<input type="text"/>	
<input checked="" type="checkbox"/> Include Patient Visits		
<b>Select Report Type</b>		
<input type="radio"/> Total Patients per IRMS		
<input type="radio"/> Total Patients per Facility Group		
<input type="radio"/> Total Patients per Facility		
<input checked="" type="radio"/> Total Patients per Physician		
<input type="radio"/> Total Patients per Program		
<input type="radio"/> Total Patients per Health Plan		
<input type="radio"/> Total Patients per Race		
<input type="radio"/> Total Patients per Ethnicity		
<input type="radio"/> Total Patients per High Risk Category		
<input type="radio"/> Total Patients per ZIP Code		
<input type="radio"/> Total Patients per State		
<input type="radio"/> Total Patients per County/Parish		
<input type="radio"/> Total Patients per District/Region		
<input type="radio"/> Total Patients per City		
<input type="button" value="Back"/> <input type="button" value="Reset"/> <input type="button" value="Create Report"/>		

2. In the **LIMIT REPORT BY** section, type the **FROM** and **TO** dates for **IMMUNIZATION DATES**, **BIRTH DATES**, or **NEXT APPOINTMENT DATES**. As soon as you type both the FROM and TO dates, the checkbox will automatically get selected/checked.
3. In the **DISPLAY BY** section, click one of the radio buttons—**ALL**, **HALF HOUR**, **HOUR**, or **DAY**. Select to display by IRMS by clicking the drop-down menu arrow (the radio button automatically will be selected) or leave the DO NOT LIMIT radio button selected for all.
4. In the **SELECT REPORT TYPE** section, click the radio button to select the **REPORT TYPE** which will group the Total Patients by:
  - IRMS
  - Facility Group
  - Facility



- Physician
- Program
- Health Plan
- Race
- Ethnicity
- High Risk Category
- Zip Code
- State
- County/Parish
- District/Region
- City

5. Point and click one of the available buttons:

- **RESET** – to erase newly entered/selected items and re-enter new criteria.
- **BACK** – to not submit the report criteria and return to the previous window.
- **CREATE REPORT** – to display the report output in a new window (sample shown below).

Patient Totals by Service			
Report Criteria		Report Date: September 29, 2005	
IRMS:	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID		
District/Region:	All		
Report Type:	By Physician		
Display By:	All		
Immunization Date Range:	All		
Birth Date Range:	All		
Appointment Date Range:	All		
Display Total Visits:	Yes		
Total Patients Selected: 6			
Physician	Total Patients	Total Visits	Percent of Total Patients Selected
NO PHYSICIAN SPECIFIED	4	6	66.7
MARCIA BRADY	2	10	33.3
Total	6	16	100.0

## PATIENT BREAKDOWN (BY SERVICE)

This report displays totals of the patients in each age grouping that were seen regardless of current patient ownership. A grand total for the "Total" column appears at the bottom of the report.



1. From the **PATIENTS CATEGORY**, point and click on the **PATIENT BREAKDOWN REPORT**. The report's limitation/selection window appears.

Patient Breakdown by Service	
<b>Limit Report By</b>	
<input type="checkbox"/> Visit Dates	From: <input type="text"/> To: <input type="text"/>
<input type="radio"/> Facility	--select-- <input type="button" value="v"/>
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> ZIP Code	<input type="text"/>
<input type="checkbox"/> State	--select-- <input type="button" value="v"/>
<input type="checkbox"/> County/Parish	--select-- <input type="button" value="v"/>
<input type="checkbox"/> Primary Care Physician	--select-- <input type="button" value="v"/>
<input type="checkbox"/> Vaccinator	--select-- <input type="button" value="v"/>
<input type="checkbox"/> Program	--select-- <input type="button" value="v"/>
<input type="checkbox"/> Health Plan	--select-- <input type="button" value="v"/>
<input type="checkbox"/> Race	--select-- <input type="button" value="v"/> White <input type="button" value="v"/>
<input type="checkbox"/> VFC Code	--select-- <input type="button" value="v"/>
<input checked="" type="checkbox"/> Inactive Status	Active patients only <input type="button" value="v"/>
<input type="checkbox"/> District/Region	<input type="text"/>
<input type="button" value="Back"/> <input type="button" value="Reset"/> <input type="button" value="Create Report"/>	

2. Point and click the "**Include Inactive Patients**" if you want to include them.
3. Type the **FROM** and **TO** dates for the **VISIT DATES**. The checkbox will automatically get selected.
4. Point and click the drop-down arrow to select to limit by the **Facility**. The radio button will automatically be selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.
5. If desired, type the **ZIP CODE**.
6. If desired, point and click on the following drop-down arrows to limit the report by:
  - State
  - County/Parish
  - Primary Care Physician
  - Vaccinator
  - Program
  - Health Plan



- Race
  - VFC Code
  - Inactive Status
7. Type the **District/Region**. This is a whole number. As soon as data is entered, the checkbox will automatically get selected.
  8. Point and click one of the available buttons:
    - **RESET** – to erase newly entered/selected items and re-enter new criteria.
    - **BACK** – to not submit the report and return to the “Reports Menu” list.
    - **CREATE REPORT** – to display the report output in a new window (sample shown below).

Patient Breakdown by Service		
Report Criteria		Report Date: March 23, 2004
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID Facility: All Inactive Status: Active patients only Primary Care Physician: All Vaccinator: All Vaccination Date Range: All Race: All Program: All		
Health Plan: All VFC Code: All State: All ZIP Code: All County/Parish: All District/Region: All		
Total Selected Patients: 35		
Age	Number of Patients	Percent of Total Selected
<u>Months</u>		
< 3	0	0.0
3 - 5	0	0.0
6 - 7	0	0.0
8 - 11	0	0.0
12 - 23	0	0.0
<u>Years</u>		
2 - 3	33	94.29
4 - 6	0	0.0
7 - 11	0	0.0

## RECALL FOR INACTIVATION

This report lists patients who have been recalled a specified number of times that have not been seen since they were recalled; hence this report can be used to inactivate them in the application.

1. From the **PATIENTS CATEGORY**, point and click on the **RECALL FOR INACTIVATION REPORT**. The report's limitation/selection window appears.



## Reminder Recall

Patient Recall for Inactivation Report	
<b>Limit Report By</b>	
Number of Recall Tries:	5 <input type="button" value="v"/> or more
<b>Birth Date Range</b>	From: <input type="text"/> To: <input type="text"/>
<input type="radio"/> Facility	--select-- <input type="button" value="v"/>
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> District / Region	<input type="text"/>
<input type="button" value="Back"/> <input type="button" value="Reset"/> <input type="button" value="Create Report"/>	

- Point and click the drop-down arrow to select the **"NUMBER OF RECALL TRIES"** (or more).
- You must type the **FROM** and **TO** dates for the **BIRTH DATE RANGE**. The checkbox will automatically get selected.
- Point and click the drop-down arrow to select to limit by the **Facility**. The radio button will automatically be selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.
- Type the **District/Region** to limit by District/Region. The checkbox will automatically get selected upon typing.
- Point and click one of the available buttons:
  - RESET** – to erase newly entered/selected items and re-enter new criteria.
  - BACK** – to not submit the report and return to the “Reports Menu” list.
  - CREATE REPORT** to display the report output in a new window (sample shown below).

Patient Reminder Recall for Inactivation Report						
Report Criteria				Report Date: May 9, 2003		
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID						
Facility: All						
Number of Recall Tries Greater than or Equal To: 5						
Birth Date Range: 11/18/1974 to 05/04/2003						
Total Patients Selected: 3						
Patient ID	First Name	Middle Name	Last Name	Birthday	# of Recall Tries	
8649	HENRIETTA		FARMERTON	03/12/2002	6	
42	BOB		SMITH	01/01/2001	6	
47	GEORGE	WILLIAM	WASHINGTON	04/04/2002	6	



## RACE AND ETHNICITY CORRELATION

This report is used to correlate race and ethnicity of patients that received service. The report can be limited based on IRMS, Facility, Facility Group, immunization date, or birth date. As with other reports of this type, it can be displayed by district. Race codes are listed on the left, and ethnicities are listed at the top.

1. From the **PATIENTS CATEGORY**, point and click on the name of the report. The report's limitation/selection window appears.

Patient Race and Ethnicity Correlation Reports		
<b>Limit Report By</b>		
<input type="checkbox"/> Immunization Dates	From: <input type="text"/>	To: <input type="text"/>
<input type="checkbox"/> Birth Dates	From: <input type="text"/>	To: <input type="text"/>
<input checked="" type="checkbox"/> IRMS	CLIENT_SERVER_INTERNAL_IRMS_ID (1000) ▼	
<input type="radio"/> Facility	--select-- ▼	
<input type="radio"/> Do Not Limit		
<input type="checkbox"/> District / Region	<input type="text"/>	
<div>Back Reset Create Report</div>		

2. Optionally, type/select the following:
  - Immunization Dates – type the FROM and TO dates.
  - Birth Dates – type the FROM and TO dates.
  - IRMS – click the drop-down menu arrow to view/select a valid choice.
  - Facility – click the drop-down menu arrow to view/select a valid facility.
  - District/Region – type the district and/or region.
3. Click one of the available buttons:
  - **RESET** – to erase the input fields and remain on the window to re-enter criteria.
  - **BACK** – to not submit the report and return to the “Reports Menu” list.



- **CREATE REPORT** – to display the report (shown below).

Patient Race and Ethnicity Correlation Report				
Report Criteria		Report Date: October 4, 2005		
IRMS:	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID			
District/Region:	All			
Facility:	All			
Immunization Date Range:	All			
Birth Date Range:	All			
	Hispanic or Latino	Not Hispanic or Latino	No Ethnicity Specified	Total
White	0	1	0	1
Black or African American	0	0	0	0
Asian	0	0	0	0
American Indian or Alaska Native	0	0	0	0
Native Hawaiian or Other Pacific Islander	0	0	0	0
Multi-racial	0	0	0	0
No Race Specified	0	0	1	1
Total	0	1	1	2

## UPDATED PATIENTS LABELS

This report will print patient labels including their name and date of birth.

1. From the **VACCINATIONS CATEGORY**, point and click on the **UPDATED PATIENT LABELS REPORT**. The report's limitation window appears.

**Recently Updated Patient Labels**

**Limit Report by**

Patient Data/Vaccinations Update Date Range: **From**  **To**

**Date Format:** mm/dd/yyyy

☐ Facility
 ☒ Do Not Limit


--select--

2. You **MUST** enter a **FROM** and **TO** date in the **red** fields, for the **PATIENT DATA/VACCINATIONS UPDATE DATE RANGE**. Type the dates using the format, mmddyyyy.
3. Optionally, click the drop-down arrow to limit the report by IRMS or **FACILITY**, or leave the **DO NOT LIMIT** radio button selected.
4. Point and click on one of the available buttons:
  - **RESET** – to erase the input fields and remain on the window to re-enter criteria.
  - **BACK** – to not submit the report and return to the “Reports Menu” list.



- **CREATE REPORT** – to display the report (shown below); The report displays.

BARKER, BOB  
Date of Birth: 01/01/1935



## HIGH RISK PATIENTS

This report details the high risk patients. The user can select the IRMS, Facility, High Risk Categories, and Vaccines. The report will print the report's criteria, run date, and total number of unique patients meeting the criteria. Also included will be the Last Name, First Name, Middle Initial, DOB, SIIS ID, most recent vaccination, and categories the patient belongs to. Each category is on its own row.

1. From the **PATIENTS** category, point and click on the **HIGH RISK PATIENTS** report. The report's limitation/selection window appears.

High Risk Patients Report	
<input type="checkbox"/> High Risk Category	--select-- ▼
<input type="checkbox"/> Vaccination	--select-- ▼
<input type="radio"/> Facility	--select-- ▼
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> District / Region	
<a href="#">Back</a> <a href="#">Reset</a> <a href="#">Create Report</a>	

2. In the **HIGH RISK CATEGORY** section, click the drop-down menu arrow to view/select a category. After a selection is made, the checkbox will automatically get selected (checked).



3. In the **VACCINATION** section, click the drop-down arrow to view/select a vaccine. After a selection is made, the checkbox will automatically get selected (checked).
4. In the **IRMS** section, click the drop-down menu arrow to view/select an IRMS.
5. In the **FACILITY/FACILITY GROUP** section, click the drop-down menu arrow to view/select a facility or group, or leave the **DO NOT LIMIT** radio button selected. After a selection is made, the radio button will automatically get selected.
6. Point and click one of the available buttons:
  - **CLEAR** – to erase the newly entered/selected items and re-enter new criteria.
  - **BACK** – to not save and exit to the reports menu window.
  - **CREATE REPORT** – to display the report (shown below).

High Risk Patients Report						
Report Criteria:				Report Date: November 22, 2004		
IRMS:	All					
Facility:	All					
High Risk Category:	All					
Vaccine:	DTaP					
Patient Total: 1						
First Name	Last Name	Middle Name	DOB	SIIS Id	Most Recent Vaccination	High Risk Category
JOHN	DOE		01/01/2000	122900	01/01/2002	ASTHMA

## VACCINES FOR CHILDREN (VFC) REPORTS

Each report's window of limitations and selections is shown under the report's title.

### VFC VACCINATIONS BREAKDOWN

This report lists the total vaccinations given for every VFC type and the percentage of the total.



- From the **VACCINATIONS FOR CHILDREN CATEGORY**, point and click on the **VFC VACCINATIONS BREAKDOWN REPORT**. The report's limitation/selection window appears.

VFC Vaccinations Breakdown Report		
<b>Limit Report By</b>		
<input type="checkbox"/> Vaccination Date Range	From: <input type="text"/>	To: <input type="text"/>
<input type="checkbox"/> Patient Birth Date Range	From: <input type="text"/>	To: <input type="text"/>
<input type="radio"/> Facility	--select-- <input type="button" value="v"/>	
<input checked="" type="radio"/> Do Not Limit		
<input type="checkbox"/> State	--select-- <input type="button" value="v"/>	
<input type="checkbox"/> County/Parish	--select-- <input type="button" value="v"/>	
<input type="checkbox"/> Vaccinator	--select-- <input type="button" value="v"/>	
<input type="checkbox"/> Health Plan	--select-- <input type="button" value="v"/>	
<input type="checkbox"/> Race	--select-- <input type="button" value="v"/> White <input type="button" value="v"/>	
<input type="checkbox"/> District/Region	<input type="text"/>	
<input type="button" value="Back"/> <input type="button" value="Reset"/> <input type="button" value="Create Report"/>		

- Type the **FROM** and **TO** dates if you want to limit the report by "**Vaccination Date Range**" or "**Patient Birth Date Range**." The checkboxes will automatically get selected after entering the dates.
- Point and click the drop-down arrow to select to limit by the **Facility**. The radio button will automatically get selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.
- If desired, point and click on the following drop-down arrows to limit the report by:
  - State
  - County/Parish
  - Vaccinator
  - Health Plan
  - Race
- If desired, type the **District/Region**. This is a whole number. As soon as data is entered, the checkbox will automatically get selected.
- Point and click one of the available buttons:



- **RESET** – to erase newly entered/selected items and re-enter new criteria.
- **BACK** – to not submit the report and return to the “Reports Menu” list.
- **CREATE REPORT** – to display the report output in a new window (sample shown below).

VFC Vaccination Breakdown		
Report Criteria		Report Date: March 23, 2004
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID		
Facility: All		
Vaccination Date Range: All		
Birth Date Range: All		
Race: All		
Health Plan: All		
Vaccinator: All		
State: All		
County/Parish: All		
District/Region: All		
Selected Total: 0		
VFC	Total Vaccinations	Percent of Total Selected
KidsCare	0	0.0
Medicaid	0	0.0
Nat. Amer.or Alaskan	0	0.0
Underinsured	0	0.0
Uninsured	0	0.0

## VACCINE ADMINISTERED

This report details the number of vaccinations given in each of the different age categories, in alphabetical order by vaccine.

1. From the **VACCINES FOR CHILDREN CATEGORY**, point and click on the **VACCINE ADMINISTERED REPORT**. The report's limitation/selection window appears.

Vaccine Administered Report	
Reporter Information	
Person Completing Report	<input type="text"/>
Phone Number	<input type="text"/>
Limit Report By	
<input type="checkbox"/> Vaccination Date Range	From: <input type="text"/> To: <input type="text"/>
<input type="radio"/> Facility	--select-- <input type="button" value="v"/>
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> District / Region	<input type="text"/>
VFC Eligibility	
<input type="radio"/> VFC Eligible Vaccinations Only	
<input checked="" type="radio"/> All Vaccinations	
Print Options	
<input checked="" type="radio"/> By Vaccine	
<input type="button" value="Back"/> <input type="button" value="Reset"/> <input type="button" value="Create Report"/>	



2. Type the **REPORTER INFORMATION** by typing the following:
  - Person Completing the Report
  - Phone Number
3. Type the **FROM** and **TO** dates if you want to limit the report by "**Vaccination Date Range**." The checkbox will automatically get selected after entering the dates.
4. Point and click the drop-down arrow to select to limit by the **Facility**. The radio button automatically will get selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.
5. Type the **District/Region** number. The checkbox will automatically get selected.
6. Point and click on the radio button to select the VFC Eligibility." Select either **VFC ELIGIBLE VACCINATIONS ONLY** or **ALL VACCINATIONS**.
7. Point and click one of the available buttons:
  - **RESET** – to erase newly entered/selected items and re-enter new criteria.
  - **BACK** – to not submit the report and return to the "Reports menu" list.
  - **CREATE REPORT** – to display the report output in a new window (sample shown below).



## Reminder Recall

Vaccine Administered Report																	
Includes ALL Vaccination Dates																	
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID																	
Facility: All																	
Provider Number: ( ) Health Department																	
( ) Non-Health Department																	
District / Region: All																	
Date Submitted: August 30, 2005																	
Person completing report:																	
Phone number:																	
Vaccine	Dose #	Months					Years										Total
		< 3	3-5	6-7	8-11	12-23	2-3	4-6	7-11	12-13	14-18	19-24	25-44	45-64	65+		
DTaP	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
	4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
	Total	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	4
Td (Adult)	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
	Total	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1

## VFC ACCOUNTABILITY LOG

This report lists birth and vaccination dates along with VFC and vaccine categories with grand totals.

- From the **VACCINES FOR CHILDREN** category, point and click on the **VFC ACCOUNTABILITY LOG REPORT**. The report's limitation/selection window appears.

VFC Accountability Log	
<input type="checkbox"/>	Include VFC Ineligible Vaccinations
<input type="checkbox"/>	Display Totals Only
<b>Limit Report by</b>	
<input type="checkbox"/>	Vaccine Date Range From: <input type="text"/> To: <input type="text"/>
Date Format: mm/dd/yyyy	
<input type="radio"/>	Facility
<input checked="" type="radio"/>	Do Not Limit
<input type="button" value="Back"/> <input type="button" value="Reset"/> <input type="button" value="Create Report"/>	

- Point and click the checkbox if you want to "**INCLUDE INELIGIBLE PATIENTS.**"
- Point and click the checkbox if you want to "**DISPLAY TOTALS ONLY.**"
- Type the **FROM** and **TO** dates for the **VACCINE DATE RANGE**. The checkbox will automatically get selected.
- Point and click the drop-down arrow to select to limit by the **Facility**. The radio button will automatically be



selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.

6. Point and click one of the available buttons:
- **RESET** – to erase newly entered/selected items and re-enter new criteria.
  - **BACK** – to not submit the report and return to the “Reports Menu” list.
  - **CREATE REPORT** – to display the report output in a new window (sample shown below).

Vaccines For Children (VFC) Program  
Vaccine Accountability Log for Public Provider/Hospital/Private and Public Use  
IRMS: 1000

VFC Eligibles(0 - 18 years)

Patient Date of Birth	Patient Vacc Date	Medi- caid	Un- insured	Amer Indian or Alaskan	Under- insured	Not Elig	DTaP	DT Peds	TD (>= 7yr old)	Hib	Hep B /Hib	IPV	MMR	Hep B (TF/PF)	Hep B Adult	Hep B 2 Dose	Var- icella	Hep A 2 Dose	Flu	Flu- nasal
04/04/2002	04/04/2002	x												x						
05/25/2002	01/01/2003	x										x								
09/29/2002	01/01/2003	x										x								
08/28/2000	04/17/2003																			
08/03/1950	04/24/2003	x										x								
05/16/2000	04/29/2003	x																		
05/16/2000	04/30/2003																	x		
		Medi- caid	Un- insured	Amer Indian or Alaskan	Under- insured	Not Elig	DTaP	DT Peds	TD (>= 7yr old)	Hib	Hep B /Hib	IPV	MMR	Hep B (TF/PF)	Hep B Adult	Hep B 2 Dose	Var- icella	Hep A 2 Dose	Flu	Flu- nasal
Totals		5	0	0	0	0	0	0	0	0	0	3	0	1	0	0	0	1	0	0

\*Hep B (TF/PF): Thimerosal Free/Preserv. Free (0-6 months)

\*Hep B (TF/PF): Thimerosal Free/Preserv. Free (0-6 months)

## SITE INFORMATION REPORTS

Each report's window of limitations and selections is shown individually under the report's title.

### PROGRAMS

This report lists all of the programs used by the state and their status (inactive or active).

From the **SITE INFORMATION CATEGORY**, point and click on the **PROGRAMS REPORT**. The report immediately appears in a separate browser providing the option to print (sample shown below).



## Reminder Recall

Programs		
Name	Inactive	Report Date: April 24, 2003
MEDICARE		
PASPORT		
WIC		

## HEALTH PLANS

This report lists all of the health plans used by the state and their status (active, inactive and whether they use Medicaid).

From the **SITE INFORMATION CATEGORY**, point and click on the **HEALTH PLANS REPORT**. The report immediately appears (sample shown below).

Health Plans			
Name	Medicaid	Inactive	Report Date: April 24, 2003
AETNA			
BLUE CROSS			

## FACILITIES DETAIL

This report lists all of the facilities, street addresses, city, state, zip code, phone number, fax number, and inactive or active status.

1. From the **SITE INFORMATION CATEGORY**, point and click on the **FACILITIES DETAIL REPORT**. The report's limitation/selection window appears.

Facilities Detail Report	
<b>Limit By</b>	
<input checked="" type="checkbox"/> IRMS	1000-CLIENT_SERVER_INTERNAL_IRMS_ID
<input type="radio"/> Facility	--select--
<input type="radio"/> Facility Group	--select--
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> Facility Type	--select--
<input type="checkbox"/> State	--select--
<input type="checkbox"/> County/Parish	--select--
<input type="checkbox"/> District/Region	
<div>Back Reset Create Report</div>	



2. Point and click the drop-down arrow to view/select by the following:
    - IRMS - To limit the report by a specific IRMS.
    - **Facility, Facility Group, Do NOT LIMIT** – to limit the report by a specific facility or facility group. The radio button will automatically be selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.
    - Facility Type – to limit the report by a specific facility type.
    - State – to limit the report by a specific state. You must select a state before selecting a county/parish.
    - County/Parish – to limit the report by a specific county or parish. You must select a state before selecting a county/parish.
- Note:** After making a selection, the checkbox or radio button will automatically get selected.
3. If desired, type the **DISTRICT/REGION**. This is a whole number. As soon as data is entered, the checkbox will automatically get selected.
  4. Point and click one of the available buttons:
    - **RESET** - to erase newly entered/selected items and re-enter new criteria
    - **CREATE REPORT** - to display the report output in a new window (sample shown below).

Facilities Detail							
Report Criteria:				Report Date: March 23, 2004			
IRMS:	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID						
Facility:	All						
State:	All						
District/Region:	All						
County/Parish:	All						
Total Facilities: 3							
Name	Street Address	City	State	ZIP Code	Phone Number	Fax	Inactive
STC	67 E WELDON	PHOENIX	AZ	85012	(602)241-1502	(602)241-1856	
TEST HOSPITAL CMG1	1 MAIN STREET	BATON ROUGE	LA	70813	(123)345-6789	(123)456-7777	
TEST							



---

## PHYSICIAN/VACCINATOR DETAIL

This report lists the physicians and/or vaccinators names along with their types (physician, vaccinator, or both) in the facility.

1. From the **SITE INFORMATION CATEGORY**, point and click on the **PHYSICIAN/VACCINATOR DETAIL REPORT**. The report's limitation/selection window appears.

Physician/Vaccinator Detail Report	
<b>Limit By</b>	
<input type="checkbox"/> Primary Care Physician	--select--
<input type="checkbox"/> Vaccinator	--select--
<input type="radio"/> Facility	--select--
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> State	--select--
<input type="checkbox"/> County/Parish	--select--
<input type="checkbox"/> District/Region	
<div>Back Reset Create Report</div>	

2. If desired, point and click on the drop-down arrow to select the **PRIMARY CARE PHYSICIAN**.
3. If desired, point and click on the drop-down arrow to select the **VACCINATOR**.
4. Point and click the drop-down arrow to select to limit by the **Facility**. The radio button will automatically be selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.
5. If desired, point and click on the drop-down arrow to select the **STATE**.
6. If desired, point and click on the drop-down arrow to select the **COUNTY/PARISH**.
7. If desired, type the **DISTRICT/REGION**. This is a whole number. As soon as data is entered, the checkbox will automatically get selected.
8. Point and click one of the available buttons:
  - **RESET** – to erase newly entered/selected items and re-enter new criteria.



- **BACK** – to not submit the report and return to the “Reports Menu” list.
- **CREATE REPORT** – to display the report output in a new window (sample shown below).

Physician/Vaccinator Detail									
Report Criteria:						Report Date: March 23, 2004			
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID									
Facility:		All							
Primary Care Physician:		All							
Vaccinator:		All							
State:		All							
County/Parish:		All							
District/Region:		All							
Physician/Vaccinator Total: 2									
First Name	Middle Name	Last Name	Suffix	Bomex	DO	Phone	Fax	Inactive	Type
MARCIA		BRADY							V
PVFNAME	PVMNAME	PVLNAME				(123)345-6789	(234)567-8901		B

## REGISTRY REPORTS

The following Registry reports can be run immediately or can be scheduled.

- Daily Status
- Provider Submission
- Provider Response
- Weekly Status
- Updated Patients/Vaccinations
- Registry Statistics
- Registry Status Report

Refer to the major section titled, "Using the Scheduler to Obtain Reports" for instructions; otherwise, the instructions listed here are to submit the report immediately.

It highly recommended that these reports be scheduled.



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## DAILY STATUS

This report requires the date to be entered.

If this report is scheduled, the fax option is available if your state is configured to use it.

1. Click on the **REPORT TITLE**. The report's limitation/selection window appears.

Daily Status Report	
Date:	<input type="text" value="03/22/2004"/>
<div>Cancel View Report</div>	

2. Type the date of the report you want to submit using the format mmddyyyy.
3. Click one of the available buttons:
  - **CANCEL** – to NOT send the report and
  - **VIEW REPORT** – to display the report in a new browser window with the option of printing.



Daily Status Report	
March 23, 2004	
Cumulative Totals	
Patients in registry	35
Ages 0 - 11 months	0
Ages 12 - 23 months	0
Ages 24 - 35 months	0
Ages 35 - 59 months	33
Ages 60 - 71 months	0
Ages 6 - 18 years	0
Ages > 18 years	2
Patients in registry without vaccinations	1
Ages 0 - 11 months	0
Ages 12 - 23 months	0
Ages 24 - 35 months	0
Ages 35 - 59 months	0
Ages 60 - 71 months	0
Ages 6 - 18 years	0
Ages > 18 years	1
Vaccinations	136
IRMS's (Total)	2
IRMS's (Public)	0
IRMS's (Private)	0
Previous Day Totals	
Patients added to registry	67
Vaccinations added to registry	141
IRMS's submitting	1
Facilities submitting	3

## PROVIDER SUBMISSION DETAIL

This report shows a detailed account of IRMS/Facility patient and vaccination imports during a specified period. It will show import counts for all IRMS's/Facilities selected by date. The report is available for all users with reporting access but is limited to the specific user's IRMS/Facility/Facility Group. This report is also available through the Schedule Reports option. When using the Scheduled Report option, it is capable of running for last day, last 7 days, or last 30 days versus a pre-set date range.



1. Click on the report's title. The report's "Limitations/Selections" window appears.

Provider Submission Detail Report	
<b>Limit Report By</b>	
<input type="radio"/> Facility	--select-- ▾
<input checked="" type="radio"/> Do Not Limit	
Date Range:	From: 7/30/2005 To: 8/29/2005
Report Type:	<input checked="" type="radio"/> Detailed <input type="radio"/> Summary
<div>Back Reset Create Report</div>	

2. If you want to limit the report by IRMS, click the drop-down menu arrow to select a valid choice. The IRMS checkbox will automatically get checked after making a selection.
3. If you want to limit the report by Facility, click the drop-down menu arrow or leave the Do Not Limit radio button selected.
4. To limit the report by a specific Date Range, type the **FROM** and **TO** dates using the format mmddyyyy.
5. In the **REPORT TYPE** section, click on the Detailed or Summary radio button.
6. Click one of the available buttons:
  - **BACK** – to not submit the report and return to the “Reports Menu” list.
  - **RESET** – to erase the newly made selections
  - **CREATE REPORT** – to run the report and display in a new browser window similar to the one shown below.

Provider Submission Detail Report				
Report Criteria:			Report Date: November 17, 2004	
IRMS: Facility: Facility Group: Start Date: 10/18/2004 End Date: 11/17/2004 Report Type: Detailed				
Date	IRMS	Facility	Patients	Vaccinations
11/17/2004	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID		13	28
			13	28

7. Either **PRINT** the report or **CLOSE** the browser window.



## PROVIDER SUBMISSION

This report reveals information about the submitting providers:

- Providers reporting in the last 30 days
  - Providers last reporting over 30 days
  - Providers last reporting over 60 days
  - Providers last reporting over 90 days
1. Click on the Report's title.
  2. The report immediately displays in a new browser window providing the option to print.

Submission Report	
March 22, 2004	
Providers reporting in the last 30 days	
IRMS: 1000 Name: CLIENT_SERVER_INTERNAL_IRMS_ID Last Date Submitted: 3/23/04 Contact Person: Phone:	
Providers last reporting over 30 days	
Providers last reporting over 60 days	
Providers last reporting over 90 days	

## PROVIDER RESPONSE

This report reveals the provider's responses from each IRMS.

1. Click on the report's title. The report's limitation/selection window appears.

Provider Response Report	
For IRMS:	CLIENT_SERVER_INTERNAL_IRMS_ID
<div>Cancel View Report</div>	

2. Click the drop-down arrow to select the **IRMS**.
3. Click one of the available buttons:
  - **CANCEL** – to not run the report and exit to the Reports menu.



- **VIEW REPORT** – to run the report and display it in a new browser window with the option of printing.

A sample of this report was not available for this release.

## WEEKLY STATUS

This report requires the end of week to be entered.

**Note:** If this report is scheduled, the fax option is available if your state is configured to use it.

1. Click on the report's title. The report's limitation/selection window appears.

Weekly Status Report	
For week ending:	<input type="text" value="03/22/2004"/>
<div>Cancel View Report</div>	

2. Type the **week ending** using the format mmddyyyy.
3. Click one of the available buttons:
  - **CANCEL** – to not run the report and exit to the Reports menu.
  - **VIEW REPORT** – to run the report and display it in a new browser window with the option of printing.



Weekly Status Report	
March 16, 2004 to March 23, 2004	
Cumulative Totals	
Patients in registry	35
Ages 0 - 11 months	0
Ages 12 - 23 months	0
Ages 24 - 35 months	0
Ages 35 - 59 months	33
Ages 60 - 71 months	0
Ages 6 - 18 years	0
Ages > 18 years	2
Patients in registry without vaccinations	1
Ages 0 - 11 months	0
Ages 12 - 23 months	0
Ages 24 - 35 months	0
Ages 35 - 59 months	0
Ages 60 - 71 months	0
Ages 6 - 18 years	0
Ages > 18 years	1
Vaccinations	136
IRMS's (Total)	2
IRMS's (Public)	0
IRMS's (Private)	0
Previous Week Totals	
Patients added to registry	67
Vaccinations added to registry	141
IRMS's submitting	1
Facilities submitting	3

## UPDATED PATIENTS/VACCINATIONS

This report will show the total number of patients/vaccinations added/updated over a particular date range by a particular IRMS (if you are a Registry Client user).

**Note:** This report uses the "update stamp" on the patient and vaccination database tables.

1. Click on the **REPORT TITLE**. The report's limitation/selection window appears.



## Reminder Recall

Updated Patients/Vaccinations Report	
Select Date Range:	From: <input type="text"/> To: <input type="text"/>
Limit Report By:	
<input type="radio"/> Facility	--select--
<input checked="" type="radio"/> Do Not Limit	
<input type="button" value="Back"/> <input type="button" value="Clear"/> <input type="button" value="Create Report"/>	

2. Type the **FROM** and **TO** date for the "Select Date Range" for which the report is going to be run. Use the date format of mmddyyyy.
3. Click one of the available buttons:
  - **BACK** – to not submit the report and return to the “Reports Menu” list.
  - **CLEAR** – to erase any entries made and remain on the window.
  - **CREATE REPORT** – to display the report in a new browser window providing the option to print.

Updated Patients/Vaccinations Report	
Date Range: 01/01/2001 to 01/01/2004	
IRMS: 1000	
<hr/>	
Patient Count: 1	
Vaccination Count: 0	

## REGISTRY STATISTICS

This report will display registry-wide statistics to determine the size of the registry (number of patients and vaccinations) and the number of providers participating. This report can take some time to display, so you can either **RUN** it now or **SCHEDULE** it to run later. Refer to the section titled, "Using the Scheduler" or continue with these instructions to run the report now.

1. From the **REGISTRY CATEGORY**, point and click on the **REPORT TITLE**, a dialog box appears.



2. Eventually the report displays providing the option to print.

Registry Statistics	
<b>Patient Totals:</b>	
Total Number of Patients:	8622
Total Number of Patients 0-2 years:	347
Total Number of Patients 2-6 years:	796
Total Number of Patients 6-18 years:	1064
Total Number of Patients with no shots:	8605
Total Number of Patients with two or more shots:	12
Total Number of New Births Since Jan. 1:	10
Total Number of Patients by Inactive Status:	
Active	8620
Address Incorrect	1
Moved or Gone Elsewhere	1
<b>Vaccination Totals:</b>	
Total Number of Vaccinations:	36
Total Number of Vaccines for Patients 0-2 years:	16
Total Number of Vaccines for Patients 2-6 years:	9
Total Number of Vaccines for Patients 6-18 years:	0
<b>Provider Totals:</b>	
Total Number of Providers:	
Undefined Site Type:	3



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## REGISTRY STATUS REPORT

This is a report that will notify the Registry Client when the database and/or web server is down. This utilizes the UFM module and "polls" the web application and database server to see if they are both up and running. An email is sent to the IT and Immunization Program staff indicating that either one of the systems are down. The user has the option of selecting the type of email.

1. From the **REGISTRY CATEGORY**, point and click on the **REPORT TITLE**. The "Registry Status Notifier" limitation window appears.

Registry Status Notifier

Send notifications when web application and database are up?: Yes ☐ No ☒

Email addresses report should be sent to:

Cancel Save

2. In the "Send Notifications when Web Application and database are up" section, click either radio button:
  - **YES** – Indicates an email is sent every time the UFM polls to see if the application and server are up.
  - **NO** – Indicates an email is sent **ONLY** when the web application or database server go down.
3. In the "**Email Addresses report should be sent to**" section, type the entire address of the person that should receive the notification.
4. Click one of the available buttons:
  - **CANCEL** – to NOT save any selections or entries made, and return to the "Reports Module" list.
  - **SAVE** – to save selections or entries made, and return to the "Reports Module" list.



## QUALITY REPORTS

These reports are used to determine the quality of information that is being entered.

**Note:** It is recommended when possible, to SCHEDULE these reports when running against a large database. If this report is scheduled, the fax option is available if your state is configured to use it.

### DATA QUALITY BY IRMS

This report lists the data elements missing from **patient** and **vaccination** records by IRMS and/or FACILITY. Specific patient **details** can be viewed after the report is displayed by clicking on the "details" hyperlink.

1. Click on the **report's title**. The report's limitations window appears with the default IRMS ID.

Data Quality Report by IRMS	
IRMS	1000
<div>Back Create Report</div>	

2. Click one of the available buttons:
  - **BACK** – to not submit the report and return to the “Reports Menu” list.
  - **CREATE REPORT** – to display the report in a separate browser window providing the option to print. The report appears similar to the one shown below.



Registry Data Quality Report  
March 23, 2004

CLIENT\_SERVER\_INTERNAL\_IRMS\_ID 1000  
Facility Not Specified

**Patient Data Quality** [details](#)

There are 35 patient(s) associated with this facility.

The following shows the percent and number of data elements that are missing from the patient records.

Address		
Street	0%	(0)
City	0%	(0)
State	0%	(0)
Phone	3%	(1)
Patient Middle Name	100%	(35)
Gender	3%	(1)
Social Security Number (SSN)	3%	(1)
Medicaid Number	6%	(2)
Mothers Maiden Name	100%	(35)
Guardian First Name	3%	(1)
Guardian Middle Name	100%	(35)
Guardian Last Name	100%	(35)
County	100%	(35)

The following shows the percent and number of data elements that are present in the patient records.

Inactive Code  
VFC Eligibility

**Vaccination Data Quality**

There are 100 vaccination(s) associated with this facility.

The following shows the percent and number of data elements that are missing from the vaccination records.

Lot Number	100%	(100)
Manufacturer	100%	(100)
Vaccinator	100%	(100)

The following shows the percent and number of data elements that are present in the vaccination records.

VFC Eligibility

## DATA QUALITY BY FACILITY

This report lists the data elements missing from **patient** and **vaccination** records by FACILITY. Specific patient **details** can be viewed after the report is displayed by clicking on the "details" hyperlink.

1. Click on the **report's title**. The report's limitations window appears.



Data Quality Report by Facility	
<input type="radio"/> Facility <input checked="" type="radio"/> Do not Limit	--select--
<div>Back</div> <div>Create Report</div>	

2. Click on the drop-down arrow and select a **FACILITY**. The Facility radio button will automatically get selected; or leave the default of **DO NOT LIMIT** selected to view all facilities.
3. Click one of the available buttons:
  - **BACK** – to not submit the report and return to the Reports Menu” list.
  - **CREATE REPORT** – to display the report in a separate browser window providing the option to print. The report appears similar to the one shown below.

Registry Data Quality Report March 23, 2004		
CLIENT_SERVER_INTERNAL_IRMS_ID 1000 STC		
<b>Patient Data Quality</b> <a href="#">details</a>		
There are 0 patient(s) associated with this facility.		
The following shows the percent and number of data elements that are missing from the patient records.		
Address		
Street	0%	(0)
City	0%	(0)
State	0%	(0)
Phone	0%	(0)
Patient Middle Name	0%	(0)
Gender	0%	(0)
Social Security Number (SSN)	0%	(0)
Medicaid Number	0%	(0)
Mothers Maiden Name	0%	(0)
Guardian First Name	0%	(0)
Guardian Middle Name	0%	(0)
Guardian Last Name	0%	(0)
County	0%	(0)
The following shows the percent and number of data elements that are present in the patient records.		
Inactive Code		
VFC Eligibility		
<b>Vaccination Data Quality</b>		
There are 1 vaccination(s) associated with this facility.		
The following shows the percent and number of data elements that are missing from the vaccination records.		
Lot Number	100%	(1)
Manufacturer	100%	(1)
Vaccinator	0%	(0)
The following shows the percent and number of data elements that are present in the vaccination records.		
VFC Eligibility		



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## PATIENT DATA QUALITY DETAIL

This report lists patient records with incomplete information.

1. Click on the report's title. The report's limitation/selection window appears.

Patient Data Quality Detail Report

Limit By

☐ Facility --select--

☒ Do Not Limit

☐ District / Region

Back Reset Create Report

2. Click the drop-down arrow to select the **IRMS** or leave the default radio button selected for **DO NOT LIMIT**.
3. Click the drop-down arrow to select the **FACILITY** or leave the default radio button selected for **DO NOT LIMIT**.
4. Type the **DISTRICT/REGION** to limit the report further. The checkbox will automatically get selected.
5. Click one of the available buttons:
  - **RESET** – to not submit the report and erase the selected limitations.
  - **BACK** – to not submit the report and return to the "Reports" menu window.
  - **CREATE REPORT** – to submit the report and display in a new browser providing the option to print.



### Registry Patient Data Quality Detail Report March 23, 2004

This Patient Data Quality Detail Report is used to enable identification of the patient records with incomplete information.

#### FACILITY UNDEFINED

**ALDAMA, MISTY** DOB:01/21/2001

MISSING ADDRESS\_STREET2, PHYSICAL\_ADDRESS, MOTHER\_MAIDEN,  
VALUES: GRD\_MIDDLE\_NAME, GRD\_LAST\_NAME, COUNTY\_CODE,  
PAT\_MIDDLE\_NAME,

**ALTSTADTER, BRANDY** DOB:01/08/2001

MISSING ADDRESS\_STREET2, PHYSICAL\_ADDRESS, MOTHER\_MAIDEN,  
VALUES: GRD\_MIDDLE\_NAME, GRD\_LAST\_NAME, COUNTY\_CODE,  
PAT\_MIDDLE\_NAME,

**BAKER, TIM** DOB:01/09/2001

MISSING ADDRESS\_STREET2, PHYSICAL\_ADDRESS, MOTHER\_MAIDEN,  
VALUES: GRD\_MIDDLE\_NAME, GRD\_LAST\_NAME, COUNTY\_CODE,  
PAT\_MIDDLE\_NAME,

**BARKER, BOB** DOB:01/01/1935

MISSING ADDRESS\_STREET2, PHYSICAL\_ADDRESS, ADDRESS\_PHONE, PAT\_GENDER,  
VALUES: MOTHER\_MAIDEN, GRD\_MIDDLE\_NAME, GRD\_LAST\_NAME, COUNTY\_CODE,  
PAT\_MIDDLE\_NAME, PAT\_SSN, PAT\_MEDICAID\_NUM,

## VACCINATION DATA QUALITY

This report summarizes vaccinations given outside the recommended administration age, and orphaned/invalid vaccinations that are invalid due to the vaccination date falling before the patient's date of birth. Administered vaccinations that were given from unspecified vaccine types (e.g., Hib-Unspecified) are also included.

**Note:** This report should be scheduled when running on large datasets because of the time it takes to run the report.

After the report is displayed, additional details can be viewed by clicking on the "**details**" hyperlink that displays the "Vaccination Data Quality Details" report.

1. Click on the **report's title**. The report's limitation/selection window appears.



## Reminder Recall

Vaccination Data Quality Report	
<b>Limit By</b>	
<input type="checkbox"/> Vaccination Date Range	From: <input type="text"/> To: <input type="text"/>
<input type="radio"/> Facility	--select-- <input type="button" value="v"/>
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> District / Region	<input type="text"/>
<input type="button" value="Back"/> <input type="button" value="Reset"/> <input type="button" value="Create Report"/>	

2. Type the **Vaccine Date Range** in the **FROM** and **TO** fields using the format mmddyyyy.
3. Click the drop-down arrow to select an **IRMS** or leave the default radio button selected for **DO NOT LIMIT**.
4. Click the drop-down arrow to select a **FACILITY** or leave the default radio button selected for **DO NOT LIMIT**.
5. Type the **DISTRICT/REGION** to limit the report further. The checkbox will automatically get selected.
6. Click one of the available buttons:
  - **RESET** – to not submit the report and erase the selected limitations.
  - **BACK** – to not run the report and return to the "Reports" menu window.
  - **CREATE REPORT** – to submit the report and display in a new browser providing the option to print.

Vaccination Data Quality Report	
July 22, 2004	
This Vaccination Data Quality Report summarizes vaccinations outside of recommended administration age or administered vaccinations that were given from unspecified vaccine types.	
Vaccination Date Range: 01/01/2003 to 01/01/2004	
<b>CLIENT_SERVER_INTERNAL_IRMS_ID</b>	
<b>FACILITY UNDEFINED</b> <a href="#">details</a>	
Hep B - unspecified - administered vaccinations that were given from unspecified vaccine types	2
Hib--unspecified - administered vaccinations that were given from unspecified vaccine types	3

7. To view the details, click on the **DETAILS** hyperlink. The "Vaccination Data Quality Detail" report displays. Refer to the next report for an illustration.



## VACCINATION DATA QUALITY DETAIL

This report summarizes vaccinations given outside the recommended administration age, and orphaned/invalid vaccinations that are invalid due to the vaccination date falling before the patient's date of birth. Administered vaccinations that were given from unspecified vaccine types (e.g., Hib-Unspecified) are also included.

After the report is displayed, additional details can be viewed by clicking on the "**details**" hyperlink.

**Note:** This report should be scheduled when running on large datasets because of the time it takes to run the report.

1. Click on the report's title. The report's limitation/selection window appears.

Vaccination Data Quality Detail Report		
<b>Limit By</b>		
<input type="checkbox"/> Vaccination Date Range	From: <input type="text"/>	To: <input type="text"/>
<input type="radio"/> Facility	--select-- <input type="button" value="v"/>	
<input checked="" type="radio"/> Do Not Limit		
<input type="checkbox"/> District / Region	<input type="text"/>	
<div>Back    Reset    Create Report</div>		

2. Type the Vaccine date range in the **FROM** and **TO** fields using the format mmddyyyy. Press the TAB key.
3. Click the drop-down arrow to select an **IRMS** or leave the default radio button selected for **DO NOT LIMIT**.
4. Click the drop-down arrow to select a **FACILITY** or leave the default radio button selected for **DO NOT LIMIT**.
5. Click one of the available buttons:
  - **RESET** – to not submit the report and erase the selected limitations.
  - **BACK** – to not submit the report and return to the "Reports" menu window.



- **CREATE REPORT** – to submit the report and display in a new browser providing the option to print.

Vaccination Data Quality Detail Report July 22, 2004						
This Vaccination Data Quality Detail Report is used to enable identification of the patient and vaccination records which were outside of the administration age or administered vaccinations that were given from unspecified vaccine types.						
Vaccination Date Range: 01/01/2003 to 01/01/2004						
IRMS	SIIS Patient #	Patient Name	Patient DOB	Vaccine	Error	Vacc Date
FACILITY UNDEFINED						
1000	122718	DUCK, DAFFY	10/01/2003	Hib--unspecified	Hib--unspecified - administered vaccinations that were given from unspecified vaccine types	12/01/2003
1000	122730	HASEGAWA, ASHTON	10/20/2003	Hep B - unspecified	Hep B - unspecified - administered vaccinations that were given from unspecified vaccine types	10/21/2003
1000	122730	HASEGAWA, ASHTON	10/20/2003	Hep B - unspecified	Hep B - unspecified - administered vaccinations that were given from unspecified vaccine types	11/23/2003
1000	43985	JONES, LILLY	04/27/2003	Hib--unspecified	Hib--unspecified - administered vaccinations that were given from unspecified vaccine types	09/16/2003
1000	43985	JONES, LILLY	04/27/2003	Hib--unspecified	Hib--unspecified - administered vaccinations that were given from unspecified vaccine types	11/25/2003

## ADMINISTRATIVE REPORTS (SECURITY MODULE)

**Note:** The Administrative reports are only available to those that have the **Security Module**.

### PATIENT QUERIES

This report is used to locate the user(s) who have performed queries on a specific patient.

1. From the **ADMINISTRATIVE CATEGORY**, point and click on the **PATIENT QUERIES REPORT**. The report's limitation/selection window appears.

Patient Queries Report	
First Name:	JOHN
Last Name:	DOE
Birth Date:	01/01/2001
<div>Back Clear Create Report</div>	



2. If a patient wasn't previously selected, you must type in the following "red" fields of information:
  - First Name
  - Last Name
  - Birth Date
3. Point and click one of the available buttons:
  - **CLEAR**—to erase newly entered text.
  - **BACK** – to not submit the report and return to the “Reports Menu” list.
  - **CREATE REPORT** – to display the report output in a new window (sample shown below).

Patient Queries Report				
Report Date: April 24, 2003				
<b>Patient Data</b>				
First Name: Sherri				
Last Name: Bull				
Birth Date: 06/03/2002				
<b>Total Queries: 45</b>				
Date	Time	User	IRMS	Facility
04/24/2003	05:27 PM	Sherri, Sherri_ic	Client_server_internal_irms_id	
04/24/2003	09:01 AM	Sherri, Sherri_ic	Client_server_internal_irms_id	
04/24/2003	08:59 AM	Sherri, Sherri_ic	Client_server_internal_irms_id	
04/17/2003	04:08 PM	Sherri, Sherri_ic	Client_server_internal_irms_id	
04/17/2003	11:06 AM	Sherri, Sherri_ic	Client_server_internal_irms_id	
04/15/2003	12:17 PM	Sherri, Sherri_iv	Client_server_internal_irms_id	
04/15/2003	11:15 AM	Sherri, Sherri_ic	Client_server_internal_irms_id	

## PATIENT CHANGES REPORT

The **Patient Changes Report** requires the same criteria as the Patient Queries report.

This report is an audit trail and lists what was changed for a specific patient, the user that made the change, date and time stamp, etc.

1. From the **ADMINISTRATIVE CATEGORY**, point and click on the **PATIENT CHANGES REPORT**. The report's limitation/selection window appears.



## Reminder Recall

Patient Changes Report	
<b>First Name:</b>	JOHN
<b>Last Name:</b>	DOE
<b>Birth Date:</b>	01/01/2001
<div> <a href="#">Back</a> <a href="#">Clear</a> <a href="#">Create Report</a> </div>	

- If a patient wasn't previously selected, you must type in the following "red" fields of information:

  - First Name
  - Last Name
  - Birth Date
- Point and click one of the available buttons:

  - CLEAR** – to erase newly entered text.
  - BACK** – to not submit the report and return to the “Reports Menu” list.
  - CREATE REPORT** – to display the report output in a new window (sample shown below).

Patient Changes Report					
					Report Date: April 24, 2003
<b>Patient Data</b>					
First Name: Sherri					
Last Name: Bull					
Birth Date: 06/03/2002					
<b>Total Changes: 14</b>					
Date	Time	Change Type	User	IRMS	Facility
04/24/2003	09:08:38 AM	Vaccination -- Delete	Sherri, Sherri_jc	Client_server_internal_irms_id	
04/24/2003	09:05:12 AM	Vaccination -- Insert	Sherri, Sherri_jc	Client_server_internal_irms_id	
04/14/2003	05:37:02 PM	Demographic -- Update	Sherri, Sherri_jc	Client_server_internal_irms_id	
04/09/2003	12:21:55 PM	Demographic -- Update	Sherri, Sherri_fc	Client_server_internal_irms_id	Caddo Parish Health Unit
04/09/2003	12:21:30 PM	Demographic -- Update	Sherri, Sherri_fc	Client_server_internal_irms_id	Caddo Parish Health Unit
04/09/2003	12:20:13 PM	Program -- Delete			
04/09/2003	12:19:35 PM	Demographic -- Update	Sherri, Sherri_fc	Client_server_internal_irms_id	Caddo Parish Health Unit
04/08/2003	04:36:53 PM	Vaccination -- Insert	Sherri, Sherri_jc	Client_server_internal_irms_id	
03/27/2003	02:02:37 PM	Demographic -- Update	Sherri, Sherri_jc	Client_server_internal_irms_id	

## ANTIGEN SUMMARY

This report displays each vaccine and the number of doses remaining.

- Click on the **report's title**. The report's limitation/selection window appears.



Antigen Summary	
<b>Limit By</b>	
<input checked="" type="checkbox"/> IRMS	CLIENT_SERVER_INTERNAL_IRMS_ID (1000) ▾
<input type="radio"/> Facility	--select-- ▾
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> District / Region	
<input type="checkbox"/> Vaccine Name	--select-- ▾
<input type="checkbox"/> Breakout By Facility <i>(Requires Vaccine Name)</i>	
<input type="checkbox"/> Lot Status	--select-- ▾
<div>Back Reset Create Report</div>	

2. To limit the report by **IRMS**, click the drop-down menu arrow to view/select a valid choice.
3. To limit the report by **FACILITY**, click the drop-down menu arrow to view/select a valid choice. The radio button will automatically select; otherwise, the report will not be limited by Facility and the “Do Not Limit” radio button remains chosen.
4. To limit the report by **DISTRICT/REGION**, type the number in the field. The checkbox will automatically select.
5. To limit the report by **VACCINE NAME**, click the drop-down menu arrow to view/select a valid choice.
6. **FACILITY**, or **VACCINE NAME**, click on the drop-down menu arrow to view/select a valid choice or leave the - select- chosen to retrieve ALL.
7. Click the **BREAKOUT BY FACILITY** checkbox to group the data by facility.
  - You **MUST** choose a **VACCINE NAME** with this option.
  - The report column will display Facility versus Vaccine Name.
8. To limit the report by **LOT STATUS**, click the drop-down menu arrow to view/select a valid choice.
  - Example lot statuses are **ACTIVE** or **INACTIVE**.
9. Click one of the available buttons:
  - **BACK** – to not submit a report and return to the previous window.



- **RESET** – to not submit the report and erase the selected limitations.
- **CREATE REPORT** – to submit the report and display in a new browser providing the option to print

Lot Number Totals	
<b>Report Criteria:</b>	<b>Report Date:</b> January 27, 2004
IRMS: All	
Facility: All	
Vaccine Name: All	
Vaccine Name	Doses Remaining
Anthrax	481
Smallpox	388
Diluent	1097

## USAGE TRACKING

This report lists the users that have not accessed or logged into SIIS and separates the users into four categories—Within 2 weeks, 30 days, 60 days, and 90 days.

The report lists the county, facility, and username for each category.

The report immediately appears after clicking on the title and appears similar to the one shown below.

Usage Tracking		
		<b>Report Date:</b> March 23, 2004
<b>Users Not Accessing SIIS within 2 weeks:</b>		
County	Facility Name	Username
		JUDY
<b>Users Not Accessing SIIS within 30 days:</b>		
County	Facility Name	Username
<b>Users Not Accessing SIIS within 60 days:</b>		
County	Facility Name	Username
<b>Users Not Accessing SIIS within 90 days:</b>		
County	Facility Name	Username
MARICOPA	STC	SHANNON_FC
		SHANNON_IC



## BAD LOGINS

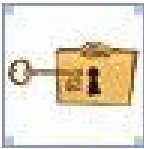
This report is used to list the number of times a user attempted to login unsuccessfully. It shows the username, password entered, the login error, IP Address, and date/time stamp of the occurrence.

1. Click the report's title. The report's limitation/selection window appears.

Bad Login Report			
From:	<input type="text" value="03/16/2004"/>	To:	<input type="text" value="Today"/>
		<input type="button" value="Cancel"/>	<input type="button" value="View Report"/>

2. Type the date in the **FROM** field using the format mmddyyyy.
3. Click one of the available buttons:
  - **CANCEL** – to not submit the report and return to the menu window.
  - **VIEW REPORT** – to submit the report in a new browser window providing the option to print.

IWeb Security Module - Bad Login Attempts				
From: 03/17/2004 00:00 To: 03/23/2004 17:21				
User Name Attempted	Password Attempted	Login Error	IP Address	Time/Date Stamp
TEST1	TREST1	INVALID LOGIN NAME OR PASSWORD	CHRISJ.PHX.STCH	03/23/2004 08:15
CHRIS_IC	CHIRS_IC	INVALID LOGIN NAME OR PASSWORD	CHRISJ.PHX.STCH	03/23/2004 09:30
SHERRI_IC	SHSERRI_IC	INVALID LOGIN NAME OR PASSWORD	SHERRIBULL.PHX.	03/23/2004 12:22
SHERRI_IC	IC	INVALID LOGIN NAME OR PASSWORD	SHERRIBULL.PHX.	03/23/2004 12:23
MARK_RC	MARKRC	INVALID LOGIN NAME OR PASSWORD	TUN12-MOROTHE.T	03/23/2004 12:31



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## 15 STATE REPORTS

Each state will have custom reports built for them. Depending on the amount of time it takes to run the report, some of them can be "scheduled" to run at a later time. The reports that can be "scheduled" to run will have a **SCHEDULE** button to the right of the report's title. Refer to the section titled "Using the Scheduler" under the **REPORTS** topic for instructions for setting up the report.

1. From the **REPORTS** menu, point and click on the **STATE REPORTS** option. The "State Reports" window appears displaying the reports for your state.
2. Additional instructions can be located under your state's name and the report's title.

### INDIANA

The following report categories are available for the state of Indiana:

- Blank Vaccine Signature Form
- Immunization Signature Form
- Shot Record Card
- Vaccinations
- County Status Report (can be run or scheduled)
- Registry (can be run or scheduled)

Each category and its report(s) will be illustrated.

The "State Reports" window appears.

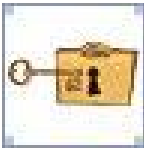



State Reports	
Patients	Vaccinations
<b>Blank Vaccine Signature Form</b>	<a href="#">Doses Administered</a>
<a href="#">Page 1 (pdf)</a>	<a href="#">Daily Patient Immunization List</a>
<a href="#">Page 2 (pdf)</a>	<a href="#">VFC Profile Report</a>
<b>Immunization Signature Form</b>	
<a href="#">Menu</a>	
<b>Shot Record Card</b>	
<b>County Status Report</b>	
<a href="#">Menu</a>	<a href="#">Schedule</a>
<b>Registry</b>	
<a href="#">Monthly Status by Race</a>	<a href="#">Schedule</a>
	<a href="#">Monthly Status by Race &amp; Facility</a>
	<a href="#">Schedule</a>
<b>Report Print Settings</b>	
Non-PDF Reports:	
Make sure to remove the Header and Footer before printing. To do this configure your browser by selecting File-->Page Setup... from the menu and deleting all text in the Header and Footer text fields.	
Shot Record Card:	
<ol style="list-style-type: none"><li>1. Click on the printer icon in Acrobat toolbar (not browser printer icon).</li><li>2. In the Printer groupbox, select your printer from the dropdown list.</li><li>3. Click the Properties button: select Landscape orientation; select Envelope #10 as your paper size; click OK button.</li><li>4. In the Copies and Adjustments groupbox, uncheck all the checkboxes.</li><li>5. Click the OK button to print.</li></ol>	

**Note:** For the reports that can be run or scheduled, there is a section titled "Using the Scheduler" for instructions to setup the report to run later.

## PAGE 1 (PDF)

1. From the **BLANK VACCINE SIGNATURE FORM CATEGORY**, point and click on the **PAGE 1 (PDF) REPORT**. The "Page 1" report appears in a new browser window.





CHILDREN AND HOOSIER IMMUNIZATION REGISTRY PROGRAM (CHIRP)  
VACCINE ADMINISTRATION  
RECORD OF PARENT/GUARDIAN OR RECEIPT SIGNATURE

I have read or had explained to me the information in the "Vaccine Information Statement(s)" or the "Important Information Statement(s)" for the disease(s) and vaccine(s) checked below. I have had a chance to ask questions and fully understand the benefits and risks of the vaccine(s) checked below. I request that these vaccines be given to me or to the person named below.

☐DT ☐Td ☐DTaP ☐DTaP-Hib ☐DTaP/HepB/IPV ☐Hib ☐IPV ☐MMR ☐HEP B ☐Varicella ☐Hib/Hep B ☐PCV-7

Last Name:		First:		Middle:	Patient ID:	Patient SSN*:
Date of Birth:	Age:	Birth State:	Birth Country:	Hoosier Hwise #:	Gender: <input type="radio"/> M <input type="radio"/> F	
Race: <input type="radio"/> White <input type="radio"/> African American <input type="radio"/> Asian <input type="radio"/> Multi-racial <input type="radio"/> Other <input type="radio"/> Nat. Hawaiian, Pac Isl. <input type="radio"/> American Indian				Hispanic Origin: <input type="radio"/> Hispanic <input type="radio"/> Non-Hispanic <input type="radio"/> Unknown		
Physician Name:				School:		
Guardian 1 Last Name:		First:		Middle:	Guardian 1 SSN*:	
Guardian 2 Last Name:		First:		Mother Maiden Name:		
Mailing Address for Responsible Adult: <input type="radio"/> Mother <input type="radio"/> Father <input type="radio"/> Other (specify) _____						
Last Name:		First Name:				
Address:		Home Phone:		Work Phone:		
City:	State:	ZIP Code:	Email Address:			
Language, if other than English (specify):			Other Phone (specify):			
<b>(Clinic use only)</b>		Chart Number:				
Funding Source: <input type="radio"/> Medicaid <input type="radio"/> Uninsured <input type="radio"/> Nat. American or Alaskan <input type="radio"/> Underinsured -- FQHC or RHC Only <input type="radio"/> Hoosier Hwise Pkg C <input type="radio"/> Not Eligible						
<small>*Social Security numbers may be used to identify patient and family members and are optional on this form. There are no penalties for failure to provide Social Security numbers.</small>						
Signature of person to receive vaccine(s) or person authorized to consent to the immunizations(s)						
<hr/>						
<i>Parent/Guardian Signature</i>						
<hr/>						
<i>Printed Name</i>						
<hr/>						
<i>Date</i>						

2. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports" window.

## PAGE 2 (PDF)

1. From the **BLANK VACCINE SIGNATURE FORM CATEGORY**, point and click on the **PAGE 2 (PDF) REPORT**. The "Page 2" report appears in a new browser window.



VACCINE ADMINISTRATION PATIENT RECORD			
Last Name:	First:	Middle:	Patient ID:
Date of Birth:	Age:	Contraindication:	
<b>Do Not Go Below This Line -- For Clinic Use Only</b>			
Clinic:		Date Vaccinated:	
		Date Information Statement Provided to Parent/Guardian/Patient:	

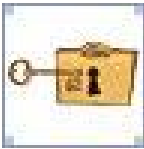
<div style="text-align: center;">Vaccine &amp; Dose # Given Today</div> <div style="text-align: center;"><input type="checkbox"/> DT Td DTaP</div> <div style="text-align: center;">○ 1 ○ 2 ○ 3 ○ 4 ○ 5</div> <div style="padding: 2px;">Manufacturer and Lot #:</div> <div style="padding: 2px;">Route/Site:</div> <div style="padding: 2px;">Date of Information Statement:</div>	<div style="text-align: center;">Vaccine &amp; Dose # Given Today</div> <div style="text-align: center;"><input type="checkbox"/> IPV</div> <div style="text-align: center;">○ 1 ○ 2 ○ 3 ○ 4 ○ 5</div> <div style="padding: 2px;">Manufacturer and Lot #:</div> <div style="padding: 2px;">Route/Site:</div> <div style="padding: 2px;">Date of Information Statement:</div>	<div style="text-align: center;">Vaccine &amp; Dose # Given Today</div> <div style="text-align: center;"><input type="checkbox"/> MMR</div> <div style="text-align: center;">○ 1 ○ 2</div> <div style="padding: 2px;">Manufacturer and Lot #:</div> <div style="padding: 2px;">Route/Site:</div> <div style="padding: 2px;">Date of Information Statement:</div>
<div style="text-align: center;">Vaccine &amp; Dose # Given Today</div> <div style="text-align: center;"><input type="checkbox"/> Hib</div> <div style="text-align: center;">○ 1 ○ 2 ○ 3 ○ 4</div> <div style="padding: 2px;">Manufacturer and Lot #:</div> <div style="padding: 2px;">Route/Site:</div> <div style="padding: 2px;">Date of Information Statement:</div>	<div style="text-align: center;">Vaccine &amp; Dose # Given Today</div> <div style="text-align: center;"><input type="checkbox"/> Hep B</div> <div style="text-align: center;">○ 1 ○ 2 ○ 3</div> <div style="padding: 2px;">Manufacturer and Lot #:</div> <div style="padding: 2px;">Route/Site:</div> <div style="padding: 2px;">Date of Information Statement:</div>	<div style="text-align: center;">Vaccine &amp; Dose # Given Today</div> <div style="text-align: center;"><input type="checkbox"/> Varicella</div> <div style="text-align: center;">○ 1 ○ 2</div> <div style="padding: 2px;">Manufacturer and Lot #:</div> <div style="padding: 2px;">Route/Site:</div> <div style="padding: 2px;">Date of Information Statement:</div>
<div style="text-align: center;">Vaccine &amp; Dose # Given Today</div> <div style="text-align: center;"><input type="checkbox"/> Pneumococcal-7</div> <div style="text-align: center;">○ 1 ○ 2 ○ 3 ○ 4</div> <div style="padding: 2px;">Manufacturer and Lot #:</div> <div style="padding: 2px;">Route/Site:</div> <div style="padding: 2px;">Date of Information Statement:</div>	<div style="text-align: center;">Vaccine &amp; Dose # Given Today</div> <div style="text-align: center;"><input type="checkbox"/> Other</div> <div style="text-align: center;">○ 1 ○ 2 ○ 3 ○ 4</div> <div style="padding: 2px;">Manufacturer and Lot #:</div> <div style="padding: 2px;">Route/Site:</div> <div style="padding: 2px;">Date of Information Statement:</div>	<div style="text-align: center;">Vaccine &amp; Dose # Given Today</div> <div style="text-align: center;"><input type="checkbox"/> Other</div> <div style="text-align: center;">○ 1 ○ 2 ○ 3 ○ 4</div> <div style="padding: 2px;">Manufacturer and Lot #:</div> <div style="padding: 2px;">Route/Site:</div> <div style="padding: 2px;">Date of Information Statement:</div>

X  
\_\_\_\_\_  
Signature and Title of Vaccine Administrator

2. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports" window.

## DOSES ADMINISTERED REPORT

1. From the **VACCINATIONS CATEGORY**, point and click on the **DOSES ADMINISTERED REPORT**. The "Doses Administered" report's limitation/selection window appears.



Doses Administered Report	
<b>Limit Report by</b>	
Vaccine Date Range:	<b>From</b> <input type="text"/> <b>To</b> <input type="text"/> <b>Date Format:</b> mm/dd/yyyy
<input checked="" type="radio"/> Age Range:	Less than 1 year, 1-2 years, 3-5 years, 6 years, 7-10 years, 11-12 years, 13-18 years, 19+
<input type="radio"/> Age Range:	Less than 3 months, 3-5 months, 5-7 months, 7-12 months, 1-2 years, 2+ years
<input type="checkbox"/> Funding Source:	--select--
<input type="radio"/> Facility	--select--
<input checked="" type="radio"/> Do Not Limit	
<div>Back Reset Create Report</div>	

2. Type the **FROM** and **TO** dates if you want to limit the report by Vaccine Date Range.
3. Click on either of the **AGE RANGE** radio buttons if you want to limit the report by AGE RANGE.
  - The first **AGE RANGE** = Less than 1 year, 1-2 years, 3-5 years, 6 years, 7-10 years, 11-12 years, 13-18 years, 19+ (This choice is the default)
  - The second **AGE RANGE** = Less than 3 months, 3-5 months, 5-7 months, 7-12 months, 1-2 years, 2+ years

**Note:** Only one radio button can be chosen at one time.

4. If desired, click the drop-down arrow to select to limit by **FUNDING SOURCE**. The checkbox will automatically get selected.
5. If desired, point and click the drop-down arrow to select a **FACILITY** or **FACILITY GROUP**. The radio button will automatically get selected, or point and click on the **DO NOT LIMIT** radio button.
6. Point and click on one of the available buttons:
  - **RESET** – to erase newly selected criteria and remain on the window to re-enter criteria.



- **BACK** – to not submit the report and return to the "Reports Menu" list.
- **CREATE REPORT** – to display the report in a new browser window.

7. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports" window.

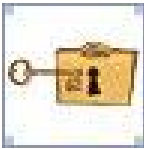
Doses Administered										
Page 1 of 1					Report Date: March 22, 2004					
<b>Report Criteria</b> IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID Date Range: 01/01/2001 To 01/01/2004 For Patients Seen at: All Clinics For Patients With Funding Code: All Funding Sources										
										Pin #
Description	Less Than 1 Year	1 Year	2 Years	3-5 Years	6 Years	7-10 Years	11-12 Years	13-18 Years	19 Years & over	Totals
DTaP	43	0	0	0	0	0	0	0	0	43
<b>Totals</b>	43	0	0	0	0	0	0	0	0	43
Total Patient(s): 15										

## DAILY PATIENT IMMUNIZATION LIST

1. From the **VACCINATIONS CATEGORY**, point and click on the **DAILY PATIENT IMMUNIZATION LIST**. The "Daily Patient Immunization List" report's limitation/selection window appears.

Daily Patient Immunization List	
<b>Limit Report By</b>	
<b>Shots Given on this Date:</b>	
<input type="radio"/> Facility <input checked="" type="radio"/> Do Not Limit	<input type="text"/> --select--
<input type="button" value="Back"/> <input type="button" value="Reset"/> <input type="button" value="Create Report"/>	

2. You **MUST** enter a **DATE** in the red field, "**SHOTS GIVEN ON THIS DATE.**" Type the date using the format, MM/DD/YYYY.
3. If desired, point and click the drop-down arrow to select a **FACILITY** or **FACILITY GROUP**. The radio button will automatically get selected, or point and click on the **DO NOT LIMIT** radio button.
4. Point and click on one of the available buttons:



- **RESET** – to erase newly selected criteria, and remain on the window to re-enter new criteria.
- **BACK** – to not submit the report and return to the “Reports Menu” list.
- **CREATE REPORT** – to display the report in a new browser window.

Daily Patient Immunization List				
Report Criteria			Report Date: May 9, 2003	
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID				
Facility: All				
Shots Given on this Date: 05/03/2003				
Patient Name	Birth Date	Vaccine	Dose	Facility
Total Number of Vaccines: 0				
Total Number of Patients: 0				

5. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports" window.

## VFC PROFILE REPORT

1. From the **VACCINATIONS CATEGORY**, point and click on the **VFC PROFILE REPORT**. The "Doses Administered" report's limitation/selection window appears.

VFC Profile Report	
<b>Limit Report By</b>	
Vaccine Date Range:	From <input type="text"/> To <input type="text"/>
<input type="radio"/> Facility	--select--
<input checked="" type="radio"/> Do Not Limit	
Back Reset Create Report	

2. You **MUST** enter a **FROM** and **TO** date in the red fields, for the **VACCINE DATE RANGE**. Type the dates using the format, MM/DD/YYYY.
3. If desired, point and click the drop-down arrow to select a **FACILITY** or **FACILITY GROUP**. The radio button will automatically get selected, or point and click on the **DO NOT LIMIT** radio button.
4. Point and click on one of the available buttons:
  - **RESET** – to erase newly selected/entered criteria and remain on the window to re-enter criteria.



- **BACK** – to not submit the report and return to the “Reports Menu” list.
- **CREATE REPORT** – to display the report in a new browser window.

VFC Profile Report

Report Criteria

Report Date: March 22, 2004

IRMS: 1000 - CLIENT\_SERVER\_INTERNAL\_IRMS\_ID

Date Range: 01/01/2001 to 06/03/2003

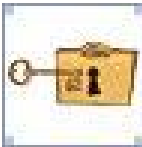
For Patients Seen at: All Clinics

Description	Less Than 1 Year	1-6 Years	7-18 Years	Totals
Medicaid	0	0	0	0
Uninsured	0	0	0	0
Nat. Amer. or Alaskan	0	0	0	0
Underinsured	0	0	0	0
Local Purchase only	0	0	0	0
Hoosier H/Wise Pkg C	0	0	0	0
317 or Insurance does not pay	0	0	0	0
Totals	0	0	0	0
Totals excluding 317 or Insurance does not pay	0	0	0	0

5. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports"

## IMMUNIZATION SIGNATURE FORM – MENU

1. Perform a search on a **PATIENT**.
2. From the **REPORTS MENU**, choose **STATE REPORTS**.
3. From the **IMMUNIZATION SIGNATURE FORM CATEGORY**, select **MENU**. The "Vaccine Immunization Patient Record" window appears.



**VACCINE ADMINISTRATION PATIENT RECORD**

Complete for Report Date: 08/30/2005

☒ Page 1

Vaccinations Requested:

<input type="checkbox"/> DT	<input type="checkbox"/> IPV
<input type="checkbox"/> Td	<input type="checkbox"/> MMR
<input type="checkbox"/> DTaP	<input type="checkbox"/> Hep-B
<input type="checkbox"/> DTaP/Hib	<input type="checkbox"/> Varicella
<input type="checkbox"/> DTaP/HepB/IPV	<input type="checkbox"/> Hib/HepB
<input type="checkbox"/> Hib	<input type="checkbox"/> Pneumococcal7

Responsible Adult: ☒ Mother ☐ Father ☐ Other... (specify: )

Other Phone Number:  (description: )

☐ Page 2

[Create Form](#) [Cancel](#)

**To Capture Guardian's Signature:**

1. Select "Page 1" and enter any necessary information.
2. Click the "Create Form" button.
3. Print out the form.
4. [Click here to open the signature capture window.](#)
5. Click the "Begin Signing" button on the signature capture window.
6. Have guardian sign printout on top of the SignatureGem Electronic Signature Pad.
7. Click the "Save Signed Form" button on the signature capture window.

Note: [Click here](#) to setup electronic signature software before using the SignatureGem Electronic Signature Pad for the first time. Choose the following options to set up the software:

1. Accept the User Agreement.
2. Choose the appropriate operating system.
3. When asked if you will be viewing signatures in Microsoft Word, choose *No*.
4. When asked if you will be viewing signatures in Adobe Acrobat, choose *No*.
5. Choose *I have a tablet, and want to sign eDocuments*.
6. When asked to select your tablet, choose *SignatureGem 1X5*.
7. When asked to select your connection type, choose *USB*.

**Saved Forms:**

**Note:** Observe the instructions noted in the window section titled, "To Capture Guardian's Signature."

4. Select the type of **Vaccination(s) Requested** by pointing and clicking the checkbox(es).
5. Point and click the radio button for the **RESPONSIBLE ADULT** (the person who will be signing the form).
6. Type the **WORK PHONE NUMBER** and/or **OTHER PHONE NUMBER**. If **OTHER PHONE NUMBER** is used, type the DESCRIPTION.

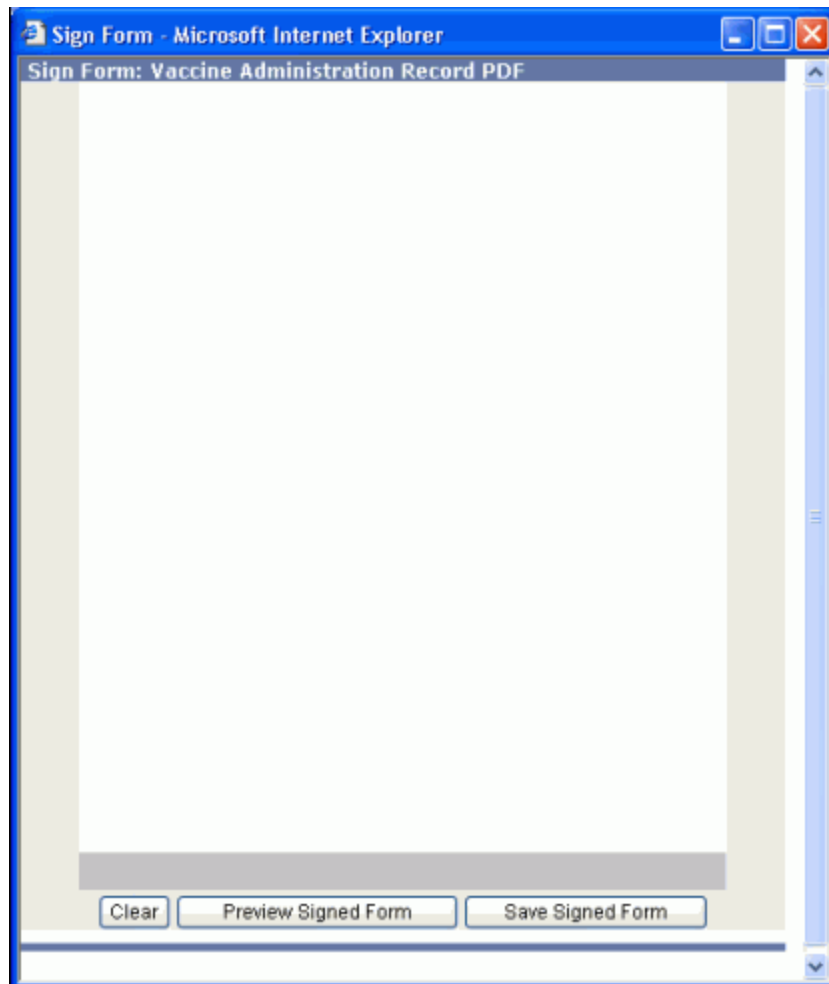
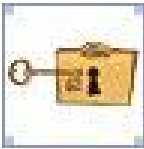


7. Type the **PARENT/GUARDIAN RELATIONSHIP TO PATIENT**.
8. Point and click on one of the available buttons:
  - **CANCEL** – to NOT submit the report and return to the “Reports Menu” list.
  - **CREATE FORM** – to display the report in a new browser window. The "Vaccine Administration / Signature Form" will display in a separate browser window.

VACCINE ADMINISTRATION RECORD OF PARENT/GUARDIAN OR RECEIPT SIGNATURE					
I have read or had explained to me the information in the "Vaccine Information Statement(s)" or the "Important Information Statement(s)" for the disease(s) and vaccine(s) checked below. I have had a chance to ask questions and fully understand the benefits and risks of the vaccine(s) checked below. I request that these vaccines be given to me or to the person named below.					
<input type="checkbox"/> DT <input type="checkbox"/> Td <input type="checkbox"/> DTaP <input type="checkbox"/> DTaP-Hib <input type="checkbox"/> Hib <input type="checkbox"/> IPV <input type="checkbox"/> MMR <input type="checkbox"/> HEP B <input type="checkbox"/> Varicella <input type="checkbox"/> Hib-Hep B <input type="checkbox"/> Pneumococcal-7					
Last Name: <b>DOE</b>	First: <b>JOHN</b>	Middle: <b>DONOVAN</b>	Patient ID: <b>1419916</b>	Patient SSN*:	
Date of Birth: <b>06/03/2000</b>	Age: <b>153 weeks; 35 months; 2 yrs</b>	Birth State: <b>LA</b>	Birth Country: <b>U.S.</b>	Hoosier Hwise #:	Gender: <input type="radio"/> M <input type="radio"/> F
Race: <input type="radio"/> White <input type="radio"/> African American <input type="radio"/> Asian <input type="radio"/> Multi-racial <input type="radio"/> Other <input type="radio"/> Nat. Hawaiian, Pac Isl. <input type="radio"/> American Indian				Hispanic Origin: <input type="radio"/> Hispanic <input type="radio"/> Non-Hispanic <input type="radio"/> Unknown	
Physician Name: <b>WHYTE, MD, MARTHA</b>				Mother Maiden Name:	
Guardian 1 LastName:		First: <b>SANDY</b>	Middle:	Guardian 1 SSN*:	
Guardian 2 LastName:		First:			
Mailing Address for Responsible Adult: <input checked="" type="radio"/> Mother <input type="radio"/> Father <input type="radio"/> Other (specify) _____					
Last Name:		First Name: <b>SANDY</b>			
Address: <b>100 LOOP STREET</b>			Home Phone:		
City: <b>SHREVEPORT</b>	State: <b>LOUISIANA</b>	ZIP Code: <b>71101</b>	Work Phone:		

9. Send the form to the printer by point and clicking on the **PRINTER ICON**.
10. Remove the form from the printer and place it on the **Electronic Signature Pad**.
11. Press the "**SIGN PAGE**" hyperlink located in the instructions noted in the window section titled, "To Capture Guardian's Signature" to get a physical signature.

**Note:** Initially, you will see the Java Plug-In logo and then the blank form appears. This form remains blank until the Parent/Guardian begins to sign their name. Their signature will appear on the window as they are signing.



12. Have the guardian **sign** in the "signature" area on the form using the ClipGem Electronic Clipboard Pen.
13. Point and click on the **SAVE SIGNED FORM** button to save the form. You will return to the "Vaccine Administration Patient Record" with your recently signed form at the bottom of the window in the Saved Forms section.

## SHOT RECORD CARD

The facility phone number will print on the shot card. The Varicella message was changed to "Varicella History: Parent report of disease" regardless of patient ownership.

1. Perform a **SEARCH** on a **PATIENT**.



- From the **REPORTS MENU**, point and click on **STATE REPORTS**.
- From the **SHOT RECORD CARD CATEGORY**, choose the **9" x 4.5" CARD**. The shot card will display in a new browser window.

[illegible]

4. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports" window.

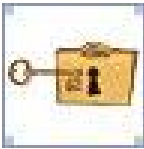
## COUNTY STATUS REPORT – MENU (RUN OR SCHEDULE)

This category only has one report at this time, referred to as **MENU**. This report can be run immediately (instructions below) or set up to run later using the scheduler. If you want to use the scheduler, refer to the section titled, "Using the Scheduler."

1. From the **COUNTY STATUS REPORT** section, click the **MENU** option. The "County Status Monthly Report" limitations/selections window appears.

County Status Monthly Report	
<b>Limit Report by</b>	
County:	--select--
<div> <a href="#">Back</a> <a href="#">Reset</a> <a href="#">Create Report</a> </div>	

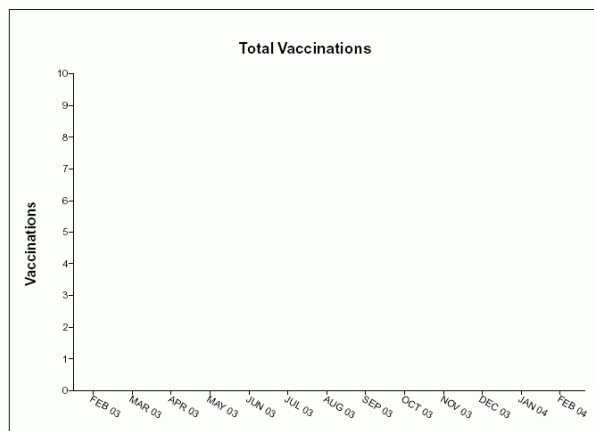
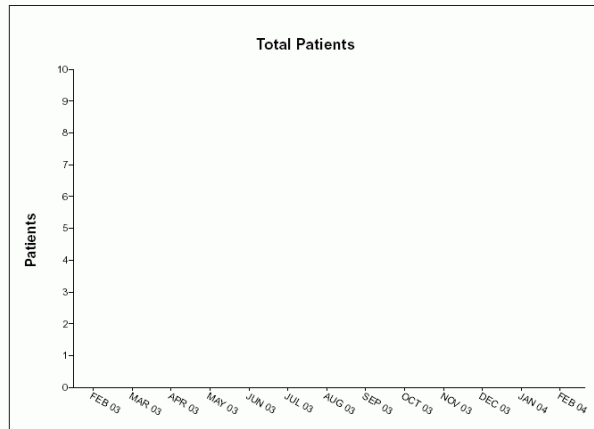
2. Click the drop-down arrow to view/select a **COUNTY**.
3. Click one of the available buttons:
  - **RESET** – to erase newly selected items.
  - **BACK** – to not run the report and return to the “Reports Menu” list.



- 
- **CREATE REPORT** – to run and display the report. This is a two-page report that lists total patients, total vaccinations, VFC Eligibility, and "run" date.



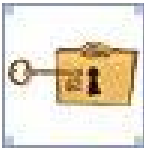
**Allen County Status Report**  
February 2003 - February 2004



Page 1 of 2

**Allen County Status Report**  
February 2004

VFC Eligibility



4. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports"

## REGISTRY

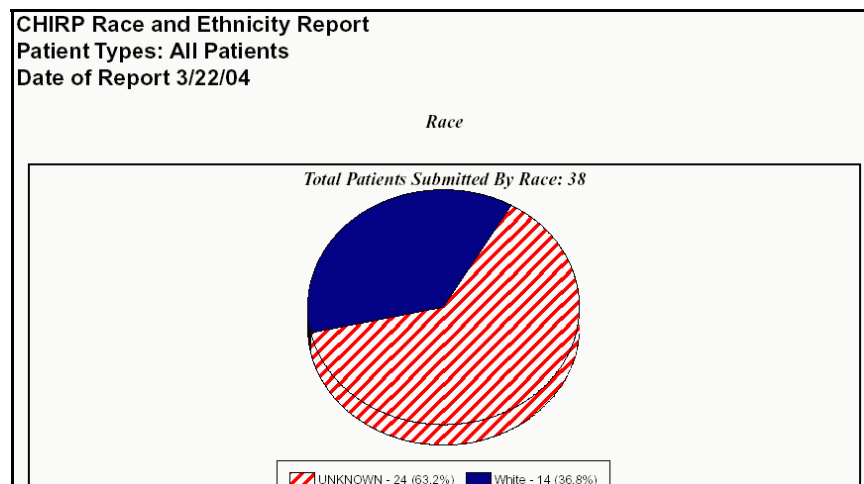
Currently there are two reports available for the Registry Users.

- Monthly Status by Race
- Monthly Status by Race and Facility

Due to the size of these reports, use the Scheduler.

## MONTHLY STATUS BY RACE

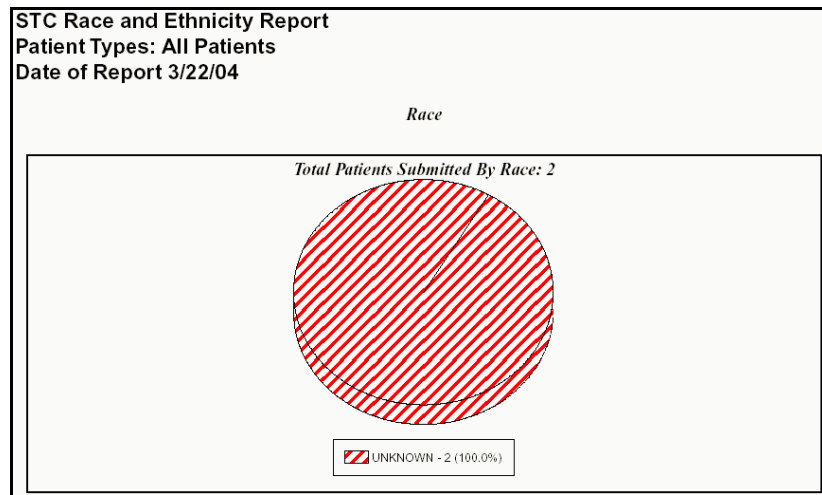
1. From the **REGISTRY REPORT** section, click the **MONTHLY STATUS BY RACE** option. The **VARIOUS GRAPHS** will display in a new browser window.



2. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports" window.

## MONTHLY STATUS BY RACE AND FACILITY

1. From the **REGISTRY REPORT** section, click the **MONTHLY STATUS BY RACE and FACILITY** option. The **VARIOUS GRAPHS** will appear.



2. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports" window.

## 16 CHANGE PASSWORD

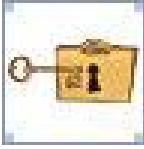
The **Change Password** option is available for all users. Once you receive your new user-id, it is recommended you change your password after you login the first time.

1. After logging into the **IWEB** application, click the **CHANGE PASSWORD** menu. The "Change Password" window appears.

Figure 16-1: Change Password

Change Password	
Current Password:	<input type="text"/>
New Password:	<input type="text"/>
New Password (again):	<input type="text"/>
<input type="button" value="Reset"/> <input type="button" value="Submit"/>	

2. Type your current password in the **CURRENT PASSWORD** field and press the **TAB** key.



- 
3. Type the new password in the **NEW PASSWORD** field and press the **TAB** key.
  4. Type the new password again in the **NEW PASSWORD (AGAIN)** field.
  5. Click the **SUBMIT** button to **SAVE** the change (a message appears at the top of the window indicating successful change) or the **RESET** button to erase the newly typed entries.

**Note:** The **RESET** button will not **RESET** a change after the **SUBMIT** button has been pressed.

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## 17 SCHEDULED REPORTS

The **Scheduled Reports** link is an administrative tool that utilizes "scheduling" of statistics including notifications. Scheduling can be done for:

- Reports
- Notifications
- Emails
- Faxes (state configurable option)

This is accomplished by setting up "scheduled" tasks in the Reports Module to automatically generate this information and send it.

**Note:** Using a scheduler such as the Microsoft Scheduler can also setup automatic running/processing of files, notifications, or reports.

For a list of the reports that can be scheduled, view the Reports Module section of the IWEB Application User Guide.

If you have the access level of IRMS Client with System Administration and UFM permissions, you will be able to view all scheduled reports for your IRMS.

If you have the access level of Registry Client with System Administration and UFM permissions, you will be able to view ALL scheduled reports for ALL IRMSs, as well as Pause the Scheduler.

### SETTING UP A SCHEDULED TASK

All Scheduled Tasks are set up directly in the **Reports Module** and/or the **Management Reports Module**.



Refer to the section titled, "Reports Module." A report that can be scheduled will have a **SCHEDULE** button to the right of the report title.

## VIEWING/EDITING SCHEDULED REPORTS

To view **SCHEDULED REPORTS**, perform the following:

1. Click the **SCHEDULE REPORTS** menu. The "Scheduled Reports Search" window appears:

Figure 17-1: Scheduled Reports Search

2. The fields and their descriptions are listed in the table:

Table 17-1: Scheduled Reports Search Field Descriptions

FIELD	DESCRIPTION
<b>IRMS</b>	<p>If you are an IRMS Client user with System Administration and UFM permissions, you can select your IRMS to view all scheduled reports.</p> <p>If you are a Registry Client user with System Administration and UFM permission, you can view ALL scheduled reports for ALL IRMSs.</p> <p>Click on the drop-down menu arrow to view/select your desired choice. The IRMS checkbox will automatically be selected.</p>
<b>FACILITY</b>	<p>To view scheduled reports for a specific facility, click the drop-down menu arrow to view/select your desired choice. The Facility radio button will automatically be selected.</p>

3. Either choose an **IRMS** and/or **Facility**, or leave them set as -Select- to select all (if authorized).
4. Click on one of the available buttons:



- **CLEAR** – to erase any selections and remain on the window to re-enter selections.
- **SEARCH** – to begin the search for the criteria you entered. The "User Scheduled Tasks/Scheduler Status" window appears.

Figure 17-2: User Scheduled Tasks/Scheduler Status

**Scheduler Status:** Running [Pause](#)

**User Scheduled Tasks**

Name:	Schedule:	Next Run Time:	
<a href="#">Doses Administered by Antigen and Age Report</a>	Every Friday at 10:20 AM	Friday, June 3, 2005 at 10:20 AM	<a href="#">Delete</a>

[View Log](#) [Back to Search](#)

5. The fields and their descriptions are listed in the table:

Table 17-2: User Scheduled Tasks/Scheduler Status Field Descriptions

FIELD	DESCRIPTION
<b>SCHEDULER STATUS</b>	Current status of the scheduler. If you are a Registry Client with System Permissions and UFM permissions, you have the authority to PAUSE the scheduler.
<b>NAME</b>	Name of the report that is scheduled. Click on the name of the report to access the Scheduler. Continue to the section titled, "Viewing the Report Criteria/Scheduler."
<b>SCHEDULE</b>	Scheduled day and time the report should run.
<b>NEXT RUN TIME</b>	Next scheduled day, date, and time the report will run

6. Click one of the available buttons/hyperlinks:
- **PAUSE/RESUME** – If you are a Registry Client, you have the authority to Pause and/or Resume a Scheduled Report.
  - **VIEW LOG** – to display the "Scheduled Report Log" window.
  - **BACK TO SEARCH** – to return to the "Scheduled Reports Search" window.
  - **DELETE** (hyperlink) – to delete the Scheduled report.



- **REPORT NAME** – to view the actual report criteria used to schedule the report. Continue to the section titled, "Viewing the Report Criteria/Scheduler."

## VIEWING/EDITING THE REPORT CRITERIA/SCHEDULER

To view/edit the Report Criteria/Scheduler, perform the following:

1. From the "User Scheduled Tasks/Scheduler Status" window, in the NAME column, click the hyperlink of the **REPORT NAME**. The "Name of Report – Limitations/Selections" window appears with the Scheduler window.



Figure 17-3: Report Name with Scheduler Window

Vaccine Administered Report	
<b>Reporter Information</b>	
Person Completing Report	<input type="text"/>
Phone Number	<input type="text"/>
<b>Limit Report By</b>	
<input type="checkbox"/> Vaccination Date Range	From: <input type="text"/> To: <input type="text"/>
<input checked="" type="checkbox"/> IRMS	1000-CLIENT_SERVER_INTERNAL_IRMS_ID ▼
<input type="radio"/> Facility	--select-- ▼
<input type="radio"/> Do Not Limit	
<input type="checkbox"/> District / Region	<input type="text"/>
<b>VFC Eligibility</b>	
<input type="radio"/> VFC Eligible Vaccinations Only	
<input checked="" type="radio"/> All Vaccinations	
<b>Print Options</b>	
<input checked="" type="radio"/> By Vaccine	
<b>Scheduler</b>	
<b>Select Schedule Parameters</b>	
Run now:	<input type="checkbox"/> (Report will run now and will <b>not</b> be scheduled for additional runs)
Minute:	:20 ▼
Hour:	10 A.M. ▼
Day of Month:	▼
Month:	▼
Day of Week:	Friday ▼
<b>Select the IRMSs, facilities, and enter email addresses the report should be sent to.</b>	
IRMS:	<div>Select an IRMS CLIENT_SERVER_INTERNAL_IRMS_ID PCIC_SOURCE SN</div>
Facility:	<div>Select a Facility SCHOOL NURSE FACILITY TEST</div>
Please add email addresses separated by commas.	
<div>Back Schedule</div>	

2. The report's limitation/selection criteria appear at the top of the window, with the Scheduler criteria at the bottom.
  - Refer to the actual report in the Module where it was submitted from for a list of field descriptions.



3. Edit the desired field(s). The fields and their descriptions are in the table.

Table 17-3: Edit Scheduled Task Field Descriptions

FIELD/OPTION	DESCRIPTION
<b>RUN NOW (CHECKBOX)</b>	If you desire to run the report NOW and NOT schedule it, click the checkbox.
<b>MINUTE</b>	The minutes that can be chosen are in five-minute intervals and will be used with the Hours field to indicate the "kick off" time for the report to run. Click on the drop-down arrow and point and click to make a selection. 00 is the default.
<b>HOUR</b>	<p>The hours are an hour apart and will be used with the Minutes field to indicate the "kick off" time for the report to run. Click on the drop-down arrow and point and click to make a selection. 12 AM is the default.</p> <p><b>Note:</b> There is a Scheduled Reports Setting that can be set by the system administrator to prevent reports to be run at a certain time. If you a report is scheduled and it doesn't run, check the Administration Settings for Scheduled Reports.</p>
<b>DAY OF MONTH</b>	Specific day of the month the report should run. If a blank appears, the report will run EVERY DAY. Click on the drop-down arrow and point and click to make a selection. Blank (or every day) is the default.
<b>MONTH</b>	Specific month the report should run. If a blank appears, the report will run EVERY MONTH. Click on the drop-down arrow and point and click to make a selection. BLANK (or every month) is the default.
<b>DAY OF WEEK</b>	Specific day of week the report should run. If a blank appears, the report will run EVERY DAY. Click on the drop-down arrow and point and click to make a selection. BLANK (or every day) is the default).
<b>IRMS FACILITY</b>	<p>Select an IRMS and/or Facility you want the report to go to.</p> <p><b>Note:</b> Multiple selections can be made by holding down the <b>CTRL</b> key, while selecting from the list.</p>



FIELD/OPTION	DESCRIPTION
EMAIL	Type the email address the report should be sent to. If there is more than one email address, separate them with a comma.

- Click one of the available buttons:
  - BACK** – to not save any changes and return to the previous window.
  - SCHEDULE** – to save your changes and advance to the module where the report originated.

### DELETING A TASK

Deletion of a Scheduled Task can be done from the Reports Module or within Scheduled Reports.

- Point and click on the **SCHEDULED REPORTS** option. The "User Scheduled Tasks/Scheduler Status" window appears
- Point and click on the **DELETE** hyperlink to the right of the report name you want to delete. The TASK will immediately get deleted and be removed from the list.

### VIEWING THE LOG

To view the Scheduled Report Log, perform the following:

- Click the **VIEW LOG** button on the "User Scheduled Tasks/Scheduler Status" window. The "Scheduled Report Log" window appears.

Figure 17-4: Scheduled Report Log

Scheduled Report Log					
Username	Description	Begin Time	End Time	Status	Error
					<a href="#">Back</a>

- The fields/columns and their descriptions are listed in the table:



Table 17-4: Scheduled Report Log Field/Column Descriptions

FIELD	DESCRIPTION
<b>USERNAME</b>	User that scheduled the report.
<b>DESCRIPTION</b>	Report Description (Title).
<b>BEGIN TIME</b>	Time that the report began to run.
<b>END TIME</b>	Time the report completed running.
<b>STATUS</b>	Status of the report.
<b>ERROR</b>	Error text if the report didn't run.

3. Click the **BACK** button to return to the "User Scheduled Tasks/Scheduler Status" window.



---

## 18 HELP MENU

There are various ways to obtain help when using the application:

- Access the **Online Help facility** (shown below).
- Refer to the **Application User Guide, Quick Start Guide**, or **Quick Reference Pamphlet**.
- Call your local contact person in your state.

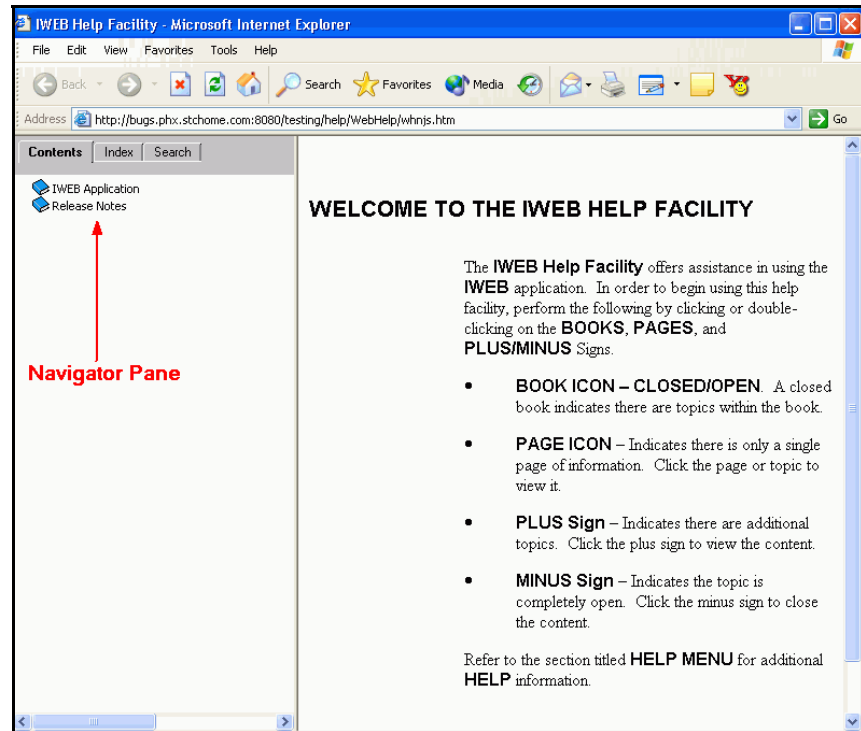
### ACCESSING ONLINE HELP

The **Online Help** menu is designed to give the user an online user guide that will explain how to use the application menus and options. It is very similar to the printed IWEB Application User Guide.

1. Point and click on the **HELP** menu. The "Welcome to the IWEB Help Facility" window appears.



Figure 18-1: Welcome to the IWEB Help Facility



Viewing the illustration, there are two books—one for the **IWEB Application** (Application User Guide) and the other is the **Release Notes** for the version listing what is new for the specific release/version.

The left side of the window is referred to as the **Navigator Pane** containing the topics while the right side of the window contains the actual content associated with the topic.

## USING THE HELP FACILITY

While using the Online Help Facility, the following can be done:

- View **Contents (Opening/Closing the Book)**
- View an **Index**
- Perform a **Search**



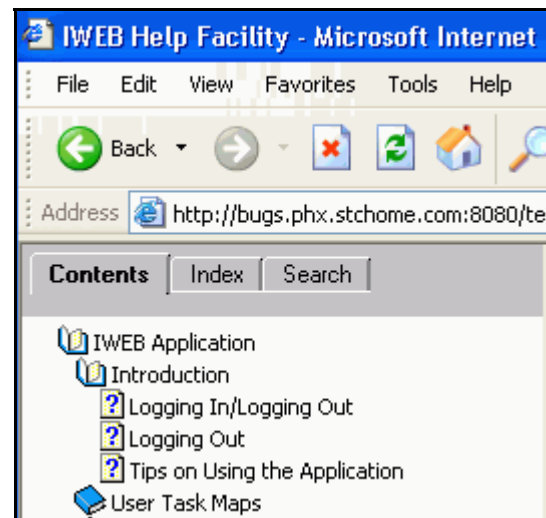
- **Close** the book

## CONTENTS—OPENING/CLOSING THE BOOK

When viewing contents, there will be pages and additional books to open.

1. When the book appears closed, click on the book or the book's hyperlink to view the contents inside the book. The contents appear as pages with a question mark on them. The illustration below shows an open book with content pages.

Figure 18-2: Open Book



2. When you are finished with a topic, you can close the book by clicking on the book.

## VIEWING AN INDEX

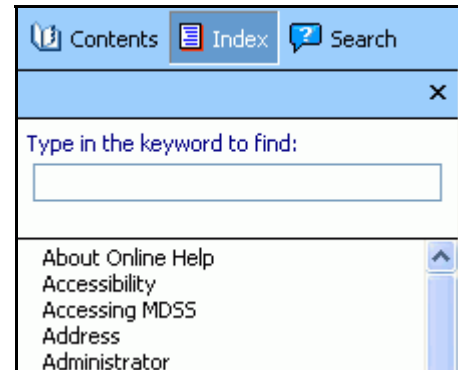
The index displays an alphabetized list where keywords can be entered. A global search is performed meaning the entire Help Facility is searched versus only the On-Line Help Facility book.

**Note:** Keyword entries are not case-sensitive.

1. Click on the **INDEX** tab.

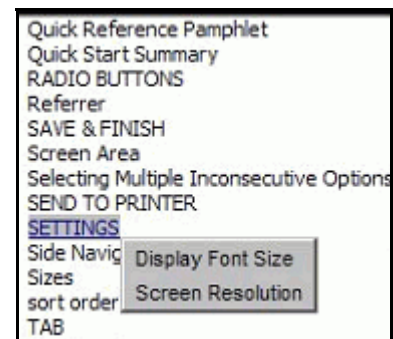


Figure 18-3: Index Tab



2. You can either:
  - **SCROLL the List** –to view the contents of the index.
  - **Type a Keyword** – to immediately reposition the index based on the letters you have typed. The index repositions as the letters are typed and will locate the first occurrence.

Figure 18-4: Keyword Sample



3. Point and click on the desired topic to view the contents.

## PERFORMING A SEARCH

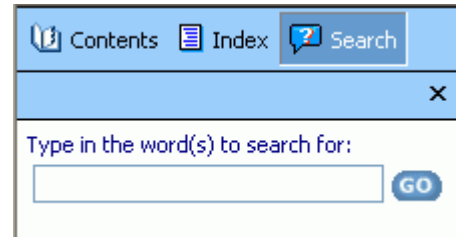
The **SEARCH** displays an open field to type and enter a keyword. A global search is performed meaning the entire Help Facility is searched versus only the On-Line Help Facility book.

**Note:** Keyword entries are not case-sensitive.



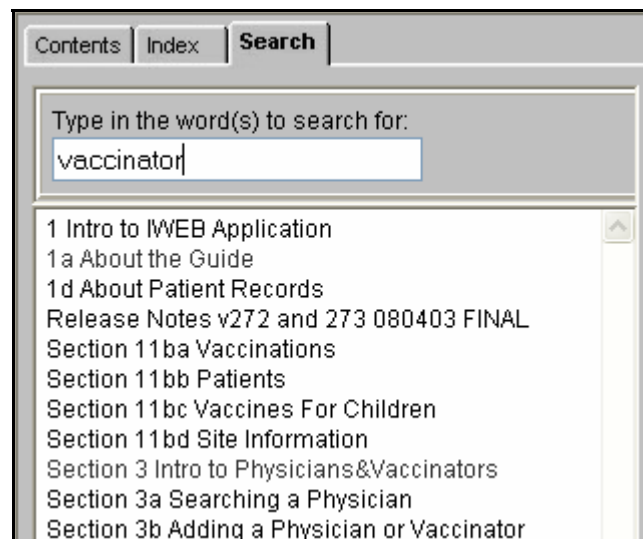
1. Click on the **SEARCH** tab.

Figure 18-5: Search Tab



2. Type the keyword and press the **ENTER** key. The search is performed and the Navigator Pane fills with the topics. If nothing is found, "**No Topics Found**" will appear in the Navigator Pane.

Figure 18-6: Navigator Pane



3. Locate the desired topic and click it to view it.

## CLOSE NAVIGATOR PANE

You can close the "Navigator Pane" on and off by pressing the **close window icon** located at the top, right corner of the "Navigator Pane" window. To turn the "Navigator Pane" back on, click the **CONTENTS** tab.

By opening the "Navigator Pane," all the books and topics will display. By closing the "Navigator Pane," the content consumes the entire window.



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## 19 JOB QUEUE (CASA EXPORT)

The **JOB QUEUE** is used to view the CASA Export Jobs that are waiting to run or are currently running.

Within the CASA Export menu, there is an option, "Text File (Server Job)," that processes files in the background. When the file is ready it can be downloaded from the CASA Log screen.

In order to use the **JOB QUEUE**, you must have the access level of Registry Client with Registry Settings permissions.

To view the Job Queue, perform the following:

1. Click the **JOB QUEUE** menu. The "Current Jobs" window appears.

Figure 19-1: Current Jobs Queue

Current Jobs			
Jobs Running			
Description	Status	Username	Date/Time Entered
Jobs Waiting			
Description	Status	Username	Date/Time Entered

2. The top portion of the window displays the currently running jobs, the bottom portion of the window indicates jobs waiting to run.
3. To exit the window, click on a different menu.



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## 20 APPENDICES

The Appendices available are listed in the table.

**Table 20-1: Appendices Topics**

APPENDIX	TOPIC DESCRIPTION
<b>A</b>	Barcode Scanner & Font Installation
<b>B</b>	Single Sign-On Registration <ul style="list-style-type: none"><li>• Requesting a SSO Username/Password)</li><li>• Requesting Application Access</li></ul>
<b>C</b>	Browser Settings <ul style="list-style-type: none"><li>• Enabling Cookies (Future)</li><li>• Enabling Scripting (Future)</li><li>• Disabling Pop-Up Blocker</li><li>• Using Pop-Up Blocker in IE (Service Pack 2)</li></ul>



## APPENDIX A: BARCODE SCANNER INSTALLATION

The scanner is designed to work with most IBM-compatible computers with PS/2 ports, and Windows operating systems. There are a few items needed before getting started:

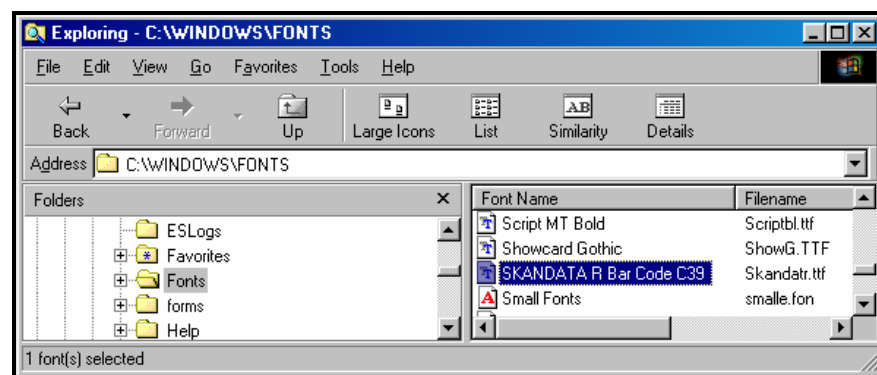
- Check the PC for the Barcode font needed for scanning. If the Bar Code font is not present, check with the system administrator to obtain it.
- There should be two components of the bar code scanner:
  - The "Y" splitter cable
  - The Wedge scanner

### BARCODE FONT INSTALLATION

Perform the following to install the Barcode font:

1. Ensure the Bar Code scanner font is installed on the computer where the scanner is to be attached.
2. The Fonts folder is usually located in the "Windows" or "WINNT" folder. For example, (C:\WINDOWS\Fonts)

Figure 20-1: Windows Barcode Font Folder



3. Turn off the computer.
4. Attach the scanner using a "Y" splitter cable.
  - A "Y" cable should be provided with the scanner for installation. It is called a "Y" splitter because it has three ends.



- 
- a) One end attaches to the PC
    - b) One to the scanner
    - c) One to the keyboard.
  - If the splitter cable does not come with the scanner, check with the system administrator to obtain it.
  5. Turn on the computer. The scanner should now be ready to use.



## APPENDIX B: BROWSER SETTINGS

The following settings should be set before you log into the IWEB Application.

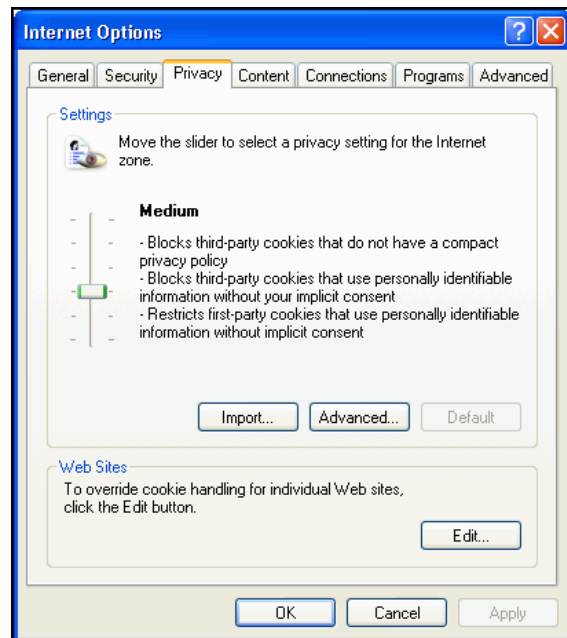
- **ENABLE** your browser to **ACCEPT COOKIES & SCRIPTING**.
- **DISABLE** your browser for **POP-UP BLOCKER**.

### ENABLING/ACCEPTING COOKIES & SCRIPTING

To enable the **COOKIES** and **SCRIPTING**, perform the following:

1. Click on **TOOLS | INTERNET OPTIONS...** and then click the **PRIVACY** tab. The "Privacy" settings appear.

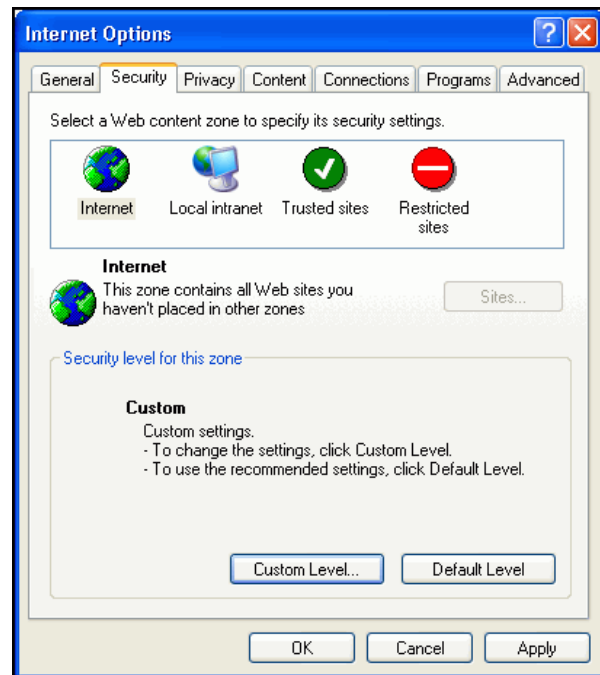
Figure 20-2: Internet Options / Privacy Tab



2. To enable the **COOKIES**, slide the slide-bar to change the "Settings" from Medium-high to **Medium**.
3. Click the **SECURITY** tab. The "Security Settings appear:

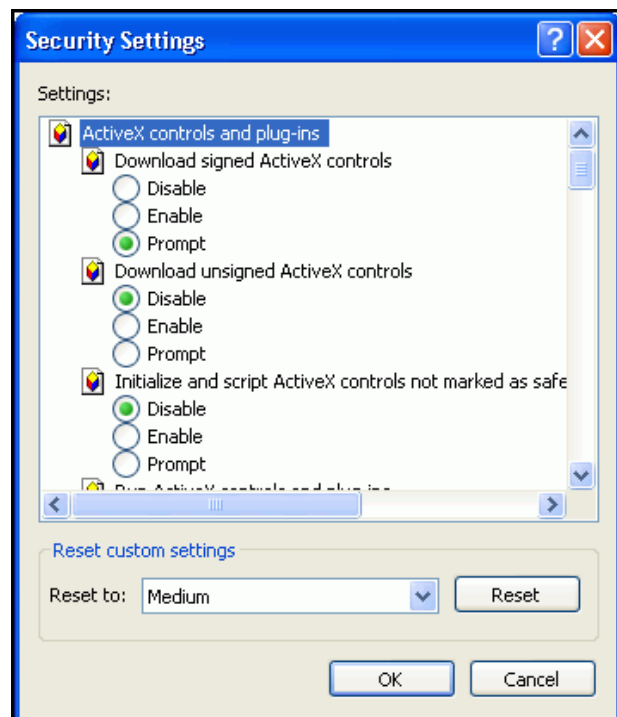


Figure 20-3: Internet Options / Security Tab



4. Click the **CUSTOM LEVEL...** button. The "Security Settings" window appears:

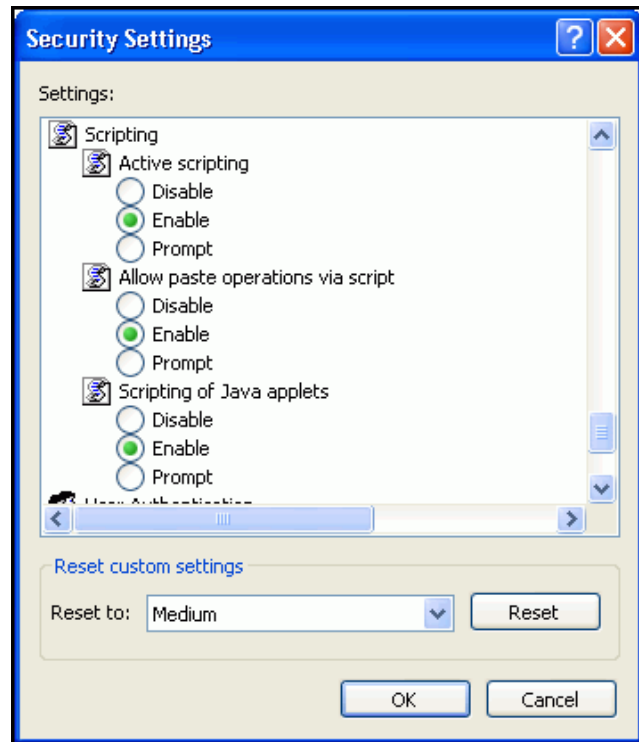
Figure 20-4: Security Settings





5. Slide the slide-bar (located on the right side of the window) down until you see the setting for **SCRIPTING**.

Figure 20-5: Security Settings / Scripting of Java Applets



6. If the **ENABLE** radio button is not selected, click it to select/enable it.
7. Click the **OK** button. The "Internet Options – Security" window reappears.
8. Click the **APPLY** button to apply the new settings and then click the **OK** button.

## DISABLING POP-UP BLOCKER

To block Pop-Ups even if they are launched when you click a link or button on a Web site, perform the following:

1. Open the **Internet Explorer Browser**.
2. On the **TOOLS** menu, point to Pop-up Blocker, and then click Pop-Up Blocker Settings.
3. Select the **HIGH** setting in the box near the bottom of the dialog box.



---

**Note:** If you want to see Pop-ups that are blocked when you have this settings turned on, hold down the CTRL key while the window opens.

## USING POP-UP BLOCKER IN IE (SERVICE PACK 2)

When installing Service Pack 2, Microsoft's Pop-Up Blocker is turned on by default in Internet Explorer and set to the medium setting, which means it will block most automatic pop-ups.

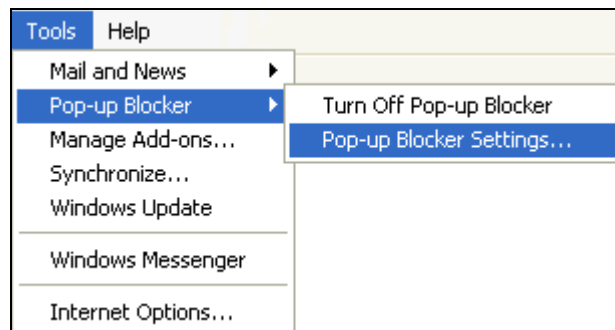
The default settings for the Pop-Up Blocker allow you to see pop-ups that are opened when you click a link or button on a Web site. Pop-Up Blocker will also play a sound and show the Information Bar when a pop-up is blocked. You can adjust these settings so that Pop-up Blocker works the way you want it to.

## CHANGING POP-UP BLOCKER SETTINGS

To change the Pop-Up Blocker Settings, perform the following:

1. Open internet Explorer. On the Tools menu, point to Pop-up Blocker, and then click Pop-up Blocker Settings.

**Figure 20-6: IE Tools Menu / Pop-up Blocker**



2. If you want to see Pop-Up windows from a specific Web site, type the address (or URL) of the site in the field labeled, "**ADDRESS OF WEB SITE TO ALLOW**" and then click the **ADD** button (illustration shown below).



Figure 20-7: Pop-Up Blocker Settings



## ALLOWING A SITE TO DISPLAY POP-UPS TEMPORARILY

To temporarily allow a site to display Pop-ups, perform the following:

1. Click the Information Bar when it notifies you that a Pop-Up has been blocked.
2. Click the option **TEMPORARILY ALLOW POP-UPS** option.

## BLOCKING POP-UPS WHEN LAUNCHED

To block Pop-Ups even if they are launched when you click a link or button on a Web site, perform the following:

1. Open the **Internet Explorer Browser**.
2. On the **TOOLS** menu, point to Pop-up Blocker, and then click Pop-Up Blocker Settings.



- 
3. Select the **HIGH** setting in the box near the bottom of the dialog box.

**Note:** If you want to see Pop-ups that are blocked when you have this settings turned on, hold down the CTRL key while the window opens.

## TROUBLESHOOTING POP-UP BLOCKER

If you have installed SP2 and you still see Pop-Ups in Internet Explorer, try these solutions below:

1. Make sure **Pop-Up Blocker** is turned on.
  - Pop-up Blocker is turned on by default, but someone may have turned it off.
2. Turn on Pop-Up Blocker, by performing the following:
  - On the **TOOLS** menu, point to Pop-Up Blocker.
  - Click the **TURN ON POP-UP BLOCKER** option.





---

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